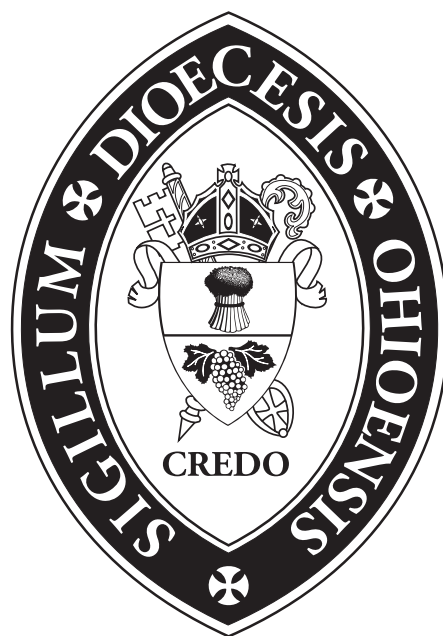


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**Journal**  
of the  
**193<sup>rd</sup>**  
**Annual**  
**Convention**  
of the  
**Episcopal**  
**Diocese**  
of  
**Ohio**



November 13–14, 2009  
Trinity Commons  
Cleveland, Ohio

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# **The Diocese of Ohio**

Trinity Commons  
2230 Euclid Avenue  
Cleveland, Ohio 44115-2499  
216.771.4815; 800.551.4815

## **2009**

### **The Bishop**

The Rt. Rev. Mark Hollingsworth Jr.

### **The Secretary of Convention**

The Rev. Dr. Brian K. Wilbert

### **The Treasurer of Convention**

P. Thomas Austin

### **The Chancellor**

Richard T. Watson

# Committees and Commissions of the Diocese of Ohio

## Standing Committee

### Term Expires 193<sup>rd</sup> Convention

The Rev. Margaret Holt Sammons  
(Secretary) Co-Rector, St.  
Michael's-in-the-Hills, Toledo

Celia C. Smart (President)  
St. James Church, Wooster

### Term Expires 194<sup>th</sup> Convention

Robert Bennett  
Harcourt Parish, Gambier

The Rev. Marie Phillips  
Rector, Epiphany, Euclid

### Term Expires 195<sup>th</sup> Convention

The Rev. Dr. J. Paul Board  
Rector, St. Paul's, Maumee

Patricia B. Kilpatrick  
Christ Church, Hudson

### Term Expires 196<sup>th</sup> Convention

The Rev. Peter Faass  
Rector, Christ Church, Shaker Heights

James Simon  
Church of Our Saviour, Akron

## Trustees

P. Thomas Austin (Treasurer)  
Trinity Cathedral, Cleveland

Susan M. Leishman (Staff)

### Term Expires 193<sup>rd</sup> Convention

Lael Carter  
St. Paul's Church, Cleveland Heights

### Term Expires 194<sup>th</sup> Convention

Michael Bickerton  
St. Peter's Church, Lakewood

### Term Expires 195<sup>th</sup> Convention

The Rev. Meghan F. Froehlich  
Rector, Church of Our  
Saviour, Akron

### Term Expires 196<sup>th</sup> Convention

John F. Shelley (President)  
Christ Church, Shaker Heights

### Term Expires 197<sup>th</sup> Convention

The Rev. Dr. C. Eric Funston  
Rector, St. Paul's, Medina

## Diocesan Council

### Ex-Officio Members

The Rt. Rev. Mark Hollingsworth, Jr.  
(President) Bishop of Ohio

The Rev. Alan C. James  
(Staff) Canon to the Ordinary,  
Diocese of Ohio

Richard T. Watson  
(Chancellor) St. Paul's Church,  
Cleveland Heights

P. Thomas Austin  
(Treasurer) Trinity Cathedral,  
Cleveland

Nancy Sherwin  
(ECW President) St. Paul's Church,  
Cleveland Heights

### Term Expires 193<sup>rd</sup> Convention

Ned K. Brooks  
St. James Church, Wooster

Linda Heitger  
St. Paul's Church, Canton

The Rev. Kelly A. O'Connell  
Rector, St. Mark's, Toledo

The Rev. Kenneth R. Pepin  
Rector, St. Timothy's, Perrysburg

Laura Nielsen  
(Deanery Representative)  
St. James Church, Painesville

Sandy Rockwell  
(Deanery Representative)  
St. Timothy's Church, Macedonia

### Term Expires 194<sup>th</sup> Convention

Charles M. Billow  
St. Paul's Church, Akron

Priscilla Hays  
St. John's Church, Youngstown

The Rev. Donna L. Maree  
Rector, Christ Church, Warren

The Rev. Daniel H. Schoonmaker  
Rector, St. Hubert's, Kirtland Hills

The Rev. Dena Cleaver-Bartholomew  
(Deanery Representative)  
Associate Rector, St. Paul's, Akron

N. Jean Parke  
(Deanery Representative)  
St. Luke's Church, Niles

### Term Expires 195<sup>th</sup> Convention

Marvin Peek  
Christ Church, Shaker Heights

The Rev. James L. Brown  
Deacon, St. Andrew's, Mentor

The Rev. Joy M. Caires  
Assistant Rector,  
Our Saviour, Akron

The Rev. David M. Bargetzi  
(Deanery Representative)  
Urban Missioner, Episcopal West  
Side Shared Ministry, Cleveland

Damon Hickey  
(Deanery Representative)  
St. James Church, Wooster

James Miller  
(Deanery Representative)  
Trinity Church, Findlay

Natalie Tallon  
(Deanery Representative)  
St. Paul's Church, Maumee

## General Convention Deputies

Denise C. Caywood  
St. Philip's Church, Akron

R. Stephen Gracey  
St. Luke's Church, Cleveland

The Rev. Alan C. James  
Canon to the Ordinary,  
Diocese of Ohio

The Rev. Gay C. Jennings  
Associate Director, CREDO Institute

Bill Joseph  
New Life Episcopal Church, Uniontown

Susannah Perkinson  
Church of Our Saviour, Akron

The Rev. T. Conrad Selnick  
Rector, St. Christopher's-by-the-  
River, Gates Mills

The Rev. Dr. Brian K. Wilbert  
Rector, Christ Church, Oberlin

**General Convention  
Provisional Deputies**

**Term Expires 195<sup>th</sup> Convention**

The Rev. J. Jeffrey Baker  
*Priest in Charge, St. Stephens'  
Shared Ministry*

Carolyn Sue Cameron  
*Christ Church, Huron*

The Rev. Margaret C. D'Anieri  
*Rector, St. Paul's, Norwalk*

N. Jean Parke  
*St. Luke's Church, Niles*

Rebecca Roth  
*Trinity Church, Toledo*

The Rev. Gregory P. Sammons  
*Co-Rector, St. Michael's-in-the-Hills,  
Toledo*

The Rev. Helen C. Svoboda-Barber  
*Rector, Harcourt Parish, Gambier*

**ECS Development Council**

The Rt. Rev. Mark Hollingsworth, Jr.  
*(Ex-Officio) Bishop of Ohio*

The Rev. Mark K. J. Robinson  
*(Staff) Canon for Mission,  
Diocese of Ohio*

**Term Expires 193<sup>rd</sup> Convention**

Cheryl Gray  
*St. Martin's Church, Chagrin Falls*

Frank Harvey  
*St. Paul's Church, Akron*

The Rev. G. Keith Owen, II  
*Rector, St. Peter's, Lakewood*

Suzanne Palmer  
*St. Timothy's Church, Macedonia*

Kenneth Robinson, III  
*St. Paul's Church, Maumee*

The Rev. T. Conrad Selnick  
*Rector, St. Christopher's-by-the-  
River, Gates Mills*

**Term Expires 194<sup>th</sup> Convention**

Meredith Bowen  
*St. Paul's Church, Cleveland Heights*

Denise C. Caywood  
*St. Philip's Church, Akron*

Karen Eubanks  
*Trinity Church, Findlay*

The Rev. Lisa E. Hackney  
*Associate Rector, St. Paul's,  
Cleveland Heights*

The Rev. Evelyn N. Manzella  
*(Chair) Rector, St. James', Wooster*

Eugene Stacy  
*Old Trinity Church, Tiffin*

**Term Expires 195<sup>th</sup> Convention**

The Rev. J. Jeffrey Baker  
*Priest in Charge, St. Stephens'  
Shared Ministry*

Anne Schwan  
*Church of Our Saviour, Akron*

George Siss  
*Church of the Redeemer, Lorain*

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*St. Peter's Church, Ashtabula*

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Diocesan Board**

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*Church of the Ascension, Lakewood*

Susan Lau (UTO Coordinator)  
*St. Paul's Church, Mount Vernon*

Sonia Miller (Treasurer)  
*St. Thomas Episcopal Church, Berea*

Mary Stewart (Worship Chair)  
*St. Paul's Church, Norwalk*

Mary Jane White (Vice President)  
*St. Thomas Episcopal Church, Berea*

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Deanery Presidents**

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*St. John's Church, Cuyahoga Falls*

Susan Clark (West)  
*Grace Church, Defiance*

Carol Ann Culp (Cleveland West)  
*Church of the Ascension, Lakewood*

Lenore Goist (Western Reserve)  
*Christ Church, Kent*

Lois LaFountain (Toledo)  
*St. Mark's Church, Toledo*

Susan Lau (South Central)  
*St. Paul's Church, Mount Vernon*

Susan Marston (Cleveland East)  
*St. Christopher's-by-the-River  
Church, Gates Mills*

Jeanne Schupp (Lake)  
*Grace Church, Willoughby*

Lorna Woodward (Youngstown)  
*St. Andrew's Church, Canfield*

**Committees of  
Annual Convention**

**Committee on**

**Constitution and Canons**

The Rt. Rev. Mark Hollingsworth, Jr.  
*(Ex-Officio) Bishop of Ohio*

Richard T. Watson (Ex-Officio)  
*St. Paul's Church, Cleveland Heights*

The Rev. Alan C. James  
*(Convenor) Canon to the Ordinary,  
Diocese of Ohio*

**Term Expires 193<sup>rd</sup> Convention**

Robert L. Larson  
*St. Paul's Church, Cleveland Heights*

The Rev. A. Bradford Purdom, III  
*Canon for Congregations,  
Diocese of Ohio*

**Term Expires 194<sup>th</sup> Convention**

Ute Lindenmaier Vilfroy  
*Trinity Cathedral, Cleveland*

The Rev. G. Keith Owen, II  
*Rector, St. Peter's, Lakewood*

**Term Expires 195<sup>th</sup> Convention**

The Rev. Helen C. Svoboda-Barber  
*Rector, Harcourt Parish, Gambier*

**Term Expires 196<sup>th</sup> Convention**

The Rev. Dr. J. Paul Board  
*Rector, St. Paul's, Maumee*

William F.B. Vodrey  
*St. Paul's Church, Cleveland Heights*

**Committee on Nominations**

Roderick Adams, Jr.  
*St. Andrew's Church, Cleveland*

David Anderson  
*St. Peter's Church, Lakewood*

Richard Goodale  
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The Rev. Alan C. James (Staff)  
*Canon to the Ordinary,  
Diocese of Ohio*

Betty Kondrich  
*Church of the Good  
Shepherd, Lyndhurst*

The Rev. Donna L. Maree  
*Rector, Christ Church, Warren*

James Miller  
*Trinity Church, Findlay*

The Rev. Beverly A. Moore-Tasy  
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The Rev. Daniel Longworth Orr  
*Priest-in-Charge, St. Paul's, Fremont*

Suzanne Palmer  
*St. Timothy's Church, Macedonia*

Susannah Perkinson  
*Church of Our Saviour, Akron*

The Rev. Daniel H. Schoonmaker  
*Rector, St. Hubert's, Kirtland Hills*

The Rev. T. Conrad Selnick  
*Rector, St. Christopher's-by-the-River, Gates Mills*

Rebecca Wilson (Chair)  
*Church of Our Saviour, Akron*

#### **Committee on Resolutions**

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*All Saints Church, Toledo*

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*St. Peter's Church, Lakewood*

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*St. Matthew's Church, Brecksville*

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*(Chair) Rector, Redeemer, Lorain*

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*Trinity Church, Toledo*

Marcia Egbert  
*Trinity Cathedral, Cleveland*

The Rev. Lisa E. Hackney  
*Associate Rector, St. Paul's,  
Cleveland Heights*

Thomas Halliday  
*St. Thomas Episcopal Church, Berea*  
Debbie Hunter  
*Trinity Cathedral, Cleveland*

Joyce McCauley-Benner  
*Trinity Church, Toledo*

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*Interim Rector, Grace, Sandusky*

The Rev. Mark K. J. Robinson  
*Canon for Mission, Diocese of Ohio*

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*St. Paul's Church, Maumee*

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*(Chair) Rector, St. Andrew's, Toledo*

#### **Audit Review Committee**

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Diocese of Ohio*

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*Christ Church, Hudson*

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*Church of the Good Shepherd,  
Lyndhurst*

Barbara Sopko  
*St. Andrew Episcopal Church, Mentor*

Sharon Watts  
*St. Paul's Church, Cleveland Heights*

#### **Budget and Finance**

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*Rector, St. Paul's, Cleveland Heights*

The Rev. Priscilla Grant  
*Canon for Ministry, Diocese of Ohio*

The Rev. Patricia L. Hanen, Ph.D.  
*Rector, New Life, Uniontown*

The Rt. Rev. Mark Hollingsworth, Jr.  
*Bishop of Ohio*

Lee Irving  
*Christ Church, Hudson*

Bill Joseph  
*New Life Episcopal Church, Uniontown*

Brian Kirby  
*St. Andrew Episcopal Church, Mentor*

Susan M. Leishman  
*Chief Financial Officer,  
Diocese of Ohio*

Robert H. Madison  
*Christ Church, Hudson*

The Rev. Peter W. Nielsen, III  
*Deacon, Executive Director, Cedar  
Hills Camp & Conference Center*

The Rev. Kelly A. O'Connell  
*Rector, St. Mark's, Toledo*

The Rev. G. Keith Owen, II  
*Rector, St. Peter's, Lakewood*

The Rev. A. Bradford Purdom, III  
*Canon for Congregations,  
Diocese of Ohio*

The Rev. Helen C. Svoboda-Barber  
*Rector, Harcourt Parish, Gambier*

Martha Wright  
*Director of Communications,  
Diocese of Ohio*

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*(Member-at-Large) Urban  
Missioner, Episcopal West Side  
Shared Ministry, Cleveland*

Charles M. Billow  
*St. Paul's Church, Akron*

The Rt. Rev. David C. Bowman  
*(Ex-Officio) Assisting Bishop,  
Diocese of Ohio*

The Rt. Rev. Mark Hollingsworth, Jr.  
*(President) Bishop of Ohio*

The Rev. Alan C. James (Staff)  
*Canon to the Ordinary,  
Diocese of Ohio*

The Rev. Kelly A. O'Connell  
*Rector, St. Mark's, Toledo*

Marvin Peek  
*Christ Church, Shaker Heights*

The Rt. Rev. William D. Persell  
*(Ex-Officio) Assisting Bishop,  
Diocese of Ohio*

Richard T. Watson  
*(Chancellor) St. Paul's Church,  
Cleveland Heights*

The Rt. Rev. Arthur B. Williams, Jr.  
*(Ex-Officio) Assisting Bishop,  
Diocese of Ohio*

P. Thomas Austin (Treasurer)  
*Trinity Cathedral, Cleveland*

#### **Loans and Grants Committee**

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*Rector, St. Paul's, Medina*

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*St. James Church, Painesville*

Sandy Rockwell  
*St. Timothy's Church, Macedonia*

Edward Stevens, III  
*St. Paul's Church, Cleveland Heights*

Nancy-Anne Wargo (Chair)  
*St. Timothy's Church, Macedonia*



**Personnel Committee**

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*Trinity Cathedral, Cleveland*

Ned Gold  
*Christ Church, Warren*

The Rev. Alan C. James  
*Canon to the Ordinary,  
Diocese of Ohio*

Robert H. Madison  
*(Chair) Christ Church, Hudson*

Christina A. Monreal  
*Trinity Cathedral, Cleveland*

The Rev. Kenneth R. Pepin  
*Rector, St. Timothy's, Perrysburg*

The Rev. Daniel H. Schoonmaker  
*Rector, St. Hubert's, Kirtland Hills*

The Rev. T. Conrad Selnick  
*Rector, St. Christopher's-by-the-  
River, Gates Mills*

Paul Tait  
*St. Timothy's Church, Perrysburg*

The Rev. Dr. Brian K. Wilbert  
*Rector, Christ Church, Oberlin*

**Socially Responsible  
Investing Committee**

P. Thomas Austin (Chair)  
*Trinity Cathedral, Cleveland*

The Rev. Lloyd F. O'Keefe  
*Retired*

Wayne Rice  
*St. Paul's Church, Akron*

**Commissions of  
the Diocese**

**Cathedral Chapter**

***Term Expires 193<sup>rd</sup> Convention***

Carol Freund  
*St. Patrick's Church, Brunswick*

The Rev. Albert A. Jennings  
*Rector, St. Timothy's, Macedonia*

**College Work Committee**

The Rev. M. Judith Alexis  
*Diocese of Connecticut*

The Rev. Gayle L. Catinella  
*Rector, St. Thomas, Berea*

The Rev. Patricia L. Hanen, Ph.D.  
*Rector, New Life, Uniontown*

The Rev. Karl Stevens  
*(Chair) Priest-in-Charge, St. Paul's,  
Mt. Vernon; Chaplain, Kenyon College*

The Rev. Dr. Brian K. Wilbert  
*Rector, Christ Church, Oberlin*

Jennifer Williamson

The Rev. Jeremiah Williamson  
*Rector, St. Andrew's, Toledo*

**Commission on Global and  
Domestic Mission**

Loviah Aldinger  
*(Co-Chair) St. Michael's-in-the-Hills  
Church, Toledo*

The Rev. J. Jeffrey Baker  
*Priest in Charge, St. Stephens'  
Shared Ministry*

Charles M. Billow  
*St. Paul's Church, Akron*

Margaret Boswell  
*St. Patrick's Church, Brunswick*

Meredith Bowen  
*St. Paul's, Cleveland Heights*

Chester Bowling  
*St. Paul's Church, Norwalk*

Joseph Bridges  
*(Co-Chair) New Life Episcopal  
Church, Uniontown*

Jim Clair  
*Church of the Epiphany, Euclid*

Carol Donley  
*Christ Church, Hudson*

Jeffrey Downey  
*St. James' Church, Boardman*

Catharine Downing  
*St. Paul's Church, Norwalk*

David Duane  
*St. Matthew's Church, Brecksville*

Paul Frank, Jr.  
*St. Paul's Church, Akron*

The Rev. Gretchen H. Green  
*Deacon*

Karen Hahn  
*St. Andrew's Church, Elyria*

Ann McConnell  
*St. Hubert's Church, Kirtland Hills*

The Rev. Daniel Longworth Orr  
*Priest-in-Charge; St. Paul's, Fremont*

The Rev. Kenneth R. Pepin  
*Rector, St. Timothy's, Perrysburg*

The Rev. Mark K. J. Robinson (Staff)  
*Canon for Mission, Diocese of Ohio*

Cindy Shaffer  
*Grace Church, Defiance*

Richard Shaffer  
*Grace Church, Defiance*

Nancy Sherwin  
*St. Paul's, Cleveland Heights*

Ruth Skladan  
*St. Andrew's Church, Elyria*

Eugene Stacy  
*Old Trinity Church, Tiffin*

The Rev. Jerrald L. Townsend  
*Harcourt Parish, Gambier*

**Commission on Ministry**

The Rev. Priscilla Grant (Staff)  
*Canon for Ministry, Diocese of Ohio*

***Term Expires 193<sup>rd</sup> Convention***

Ted Dingle  
*St. Paul's Church, Mount Vernon*

The Rev. Albert A. Jennings  
*Rector, St. Timothy's, Macedonia*

Hilary King  
*Christ Church, Shaker Heights*

***Term Expires 194<sup>th</sup> Convention***

The Very Rev. Tracey Lind  
*Dean, Trinity Cathedral, Cleveland*

The Rev. M. Webster Maughan  
*Chaplain, Stein Hospice Service,  
Sandusky; Interim Pastor,  
St. Paul's, Put-in-Bay*

Robert Pierce  
*Christ Church, Oberlin*

***Term Expires 195<sup>th</sup> Convention***

The Rev. Bryan C. Gillooly  
*Deacon; Bellaire-Puritas  
Development Corp.*

Betty Kondrich  
*Church of the Good Shepherd, Lyndhurst*

The Rev. G. Keith Owen, II  
*Rector, St. Peter's, Lakewood*

Lynette Williams

***Term Expires 196<sup>th</sup> Convention***

Jane R. Freeman  
*St. Paul's Church, Akron*

The Rev. Dr. C. Eric Funston  
*Rector, St. Paul's, Medina*

The Rev. Alan M. Gates (*Chair*)  
*Rector, St. Paul's, Cleveland Heights*

Lynnette Miller  
*St. Philip's Church, Akron*

#### **Committee on the Diaconate**

The Rev. Kirby P. Colwell, II  
*Deacon, St. Paul's, Cleveland Heights*

The Rev. Margaret C. D'Anieri  
*Rector, St. Paul's, Norwalk*

The Rev. Priscilla Grant (*Staff*)  
*Canon for Ministry, Diocese of Ohio*

The Rev. Patricia L. Hanen, Ph.D.  
*Rector, New Life, Uniontown*

Hilary King  
*Christ Church, Shaker Heights*

The Rev. Peter W. Nielsen, III  
*Deacon; Executive Director, Cedar Hills Camp & Conference Center*

Susannah Perkinson  
*Church of Our Saviour, Akron*

The Rev. Marie Phillips (*Chair*)  
*Rector, Epiphany, Euclid*

The Rev. R. Stephen Sedgwick  
*Rector, Redeemer, Lorain*

#### **Committee on the Priesthood**

Ted Dingler  
*St. Paul's Church, Mount Vernon*

Jeffrey Downey  
*St. James' Church, Boardman*

The Rev. Meghan F. Froehlich  
*Rector, Church of Our Saviour, Akron*

The Rev. Priscilla Grant (*Staff*)  
*Canon for Ministry, Diocese of Ohio*

The Very Rev. Tracey Lind  
*Dean, Trinity Cathedral, Cleveland*

Linda Martin  
*Christ Church, Hudson*

The Rev. M. Webster Maughan  
*Chaplain, Stein Hospice Service; Interim Pastor, St. Paul's, Put-in-Bay*

#### **Congregational Development Commission**

The Rev. Joseph L. Ashby  
*Rector, Grace, Mansfield*

The Rev. David M. Bargetzi  
*Urban Missioner, Episcopal West Side Shared Ministry, Cleveland*

The Rev. Dr. Barbara L. Bond  
*Rector, St. Paul's, Canton*

The Rev. Gayle L. Catinella  
*Rector, St. Thomas, Berea*

The Rev. Dena Cleaver-Bartholomew  
*Associate Rector, St. Paul's, Akron*

The Rev. W. Merritt Greenwood

The Rev. A. Bradford Purdom, III  
*(Staff) Canon for Congregations, Diocese of Ohio*

The Rev. Daniel H. Schoonmaker  
*Rector, St. Hubert's, Kirtland Hills*

The Rev. Christine E. Schutz  
*Rector, Trinity, Findlay*

The Rev. R. Stephen Sedgwick  
*Rector, Redeemer, Lorain*

The Rev. Karl Stevens  
*Priest-in-Charge, St. Paul's, Mt. Vernon; Chaplain, Kenyon College*

Reed Stith  
*Christ Church, Hudson*

The Rev. Brian S. Suntken  
*Rector, Christ Church, Hudson*

#### **Deanery Review Committee**

The Rev. Joseph L. Ashby  
*Rector, Grace, Mansfield*

Ken Baker  
*Trinity Church, Alliance*

The Rev. J. Jeffrey Baker  
*Priest in Charge, St. Stephens' Shared Ministry*

Ned K. Brooks  
*St. James Church, Wooster*

The Rev. Margaret C. D'Anieri  
*Rector, St. Paul's, Norwalk*

The Rev. Peter Faass  
*Rector, Christ Church, Shaker Heights*

Linda Heitger  
*St. Paul's Church, Canton*

Catherine Huber  
*St. Andrew's Church, Toledo*

The Rev. Alan C. James (*Staff*)  
*Canon to the Ordinary, Diocese of Ohio*

The Rev. Albert A. Jennings  
*Rector, St. Timothy's, Macedonia*

The Rev. M. Webster Maughan  
*Chaplain, Stein Hospice Service, Interim Pastor, St. Paul's, Put-in-Bay*

The Rev. Christopher R. McCann  
*Priest-in-Charge, St. Luke's, Chardon*

Mary Jo McFarlane  
*Trinity Church, Findlay*

Laura Nielsen  
*St. James Church, Painesville*

N. Jean Parke  
*St. Luke's Church, Niles*

The Rev. Kenneth R. Pepin  
*Rector, St. Timothy's, Perrysburg*

Sandy Rockwell  
*St. Timothy's Church, Macedonia*

Douglas R. Sundstrom  
*St. Andrew Episcopal Church, Mentor*

Paul Tait  
*St. Timothy's Church, Perrysburg*

The Rev. Dr. Brian K. Wilbert  
*Rector, Christ Church, Oberlin*

#### **Diocesan Judicial Panel**

The Rev. Alan C. James (*Staff*)  
*Canon to the Ordinary, Diocese of Ohio*

#### **Term Expires 195<sup>th</sup> Convention**

The Rev. Carol S. Evans  
*Rector, Grace, Ravenna*

Jane R. Freeman  
*St. Paul's Church, Akron*

Justice Johnson  
*St. Michael's-in-the-Hills Church, Toledo*

The Rev. Evelyn N. Manzella  
*Rector, St. James', Wooster*

The Rev. R. Stephen Sedgwick  
*Rector, Redeemer, Lorain*

#### **Term Expires 196<sup>th</sup> Convention**

The Rev. Gayle L. Catinella  
*Rector, St. Thomas, Berea*

Ute Lindenmaier Vilfroy  
*Trinity Cathedral, Cleveland*

The Rev. Christopher R. McCann  
*Priest-in-Charge, St. Luke's, Chardon*

William F.B. Vodrey  
*St. Paul's Church, Cleveland Heights*



**Hunger & Homelessness  
Task Force**

Lydia Bailey  
*Church of the Epiphany, Euclid*

Kristi Ballinger  
*Church of the Epiphany, Euclid*

Judy Canan  
*Grace Church, Ravenna*

The Rev. Kirby P. Colwell, II  
*Deacon, St. Paul's, Cleveland Heights*

The Rev. Barbara J. Maxwell  
*Deacon, Episcopal West Side  
Shared Ministry*

The Rev. Peter W. Nielsen, III  
*(Co-Chair) Deacon, Executive  
Director, Cedar Hills Camp &  
Conference Center*

Harry Jack Ream  
*Trinity Church, New Philadelphia*

The Rev. Mark K. J. Robinson  
*(Staff) Canon for Mission,  
Diocese of Ohio*

Janet Smart (Co-Chair)  
*St. James' Church, Boardman*

**Interim Team**

Nancy Baxter  
*Christ Church, Kent*

The Rev. Dr. J. Paul Board  
*Rector, St. Paul's, Maumee*

The Rev. James F. Cooney

The Rev. Margaret C. D'Anieri  
*Rector, St. Paul's, Norwalk*

Carol Freund  
*St. Patrick's Church, Brunswick*

The Rev. Priscilla Grant (Staff)  
*Canon for Ministry, Diocese of Ohio*

The Rev. W. Merritt Greenwood

The Rev. James G. Greer, Jr.

The Rev. John H. Hayden

The Rev. Albert A. Jennings  
*Rector, St. Timothy's, Macedonia*

The Rev. John S. Keller  
*Retired, Interim Pastor,  
Ascension, Lakewood*

The Rev. M. Webster Maughan  
*Chaplain, Stein Hospice Service;  
Interim Pastor, St. Paul's, Put-in-Bay*

The Rev. Dr. Elaine McCoy, Ph.D.  
*Interim Rector, Grace, Sandusky*

The Rev. Gary A. McElroy

The Rev. Gary A. Mitchener

The Rev. C. Eugene Pearson  
*Retired; Priest-in-Charge, Grace,  
Defiance; Chaplain, Kingston  
Healthcare, Toledo*

The Rev. Edward M. Perkinson  
*Marriage and Family Therapist*

The Rev. John Reinheimer  
*Retired, Interim Priest, Trinity, Tiffin*

The Rev. T. Conrad Selnick  
*Rector, St. Christopher's-by-the-  
River, Gates Mills*

The Rev. Dr. Erwin M. Smuda  
*Retired; Interim Pastor,  
St. John's, Youngstown*

Barbara W. Thomas  
*St. Peter's Church, Lakewood*

Annette Yug  
*Church of the Redeemer, Lorain*

**Joint Systemic  
Barriers Committee**

The Rev. Margaret C. D'Anieri  
*Rector, St. Paul's, Norwalk*

Carol Franklin, Ph.D.  
*Christ Church, Shaker Heights*

Kate Gillooly  
*St. Paul's Church, Cleveland Heights*

The Rev. Bryan C. Gillooly  
*Deacon; Bellaire-Puritas  
Development Corp.*

Hilary King  
*Christ Church, Shaker Heights*

Heather D. Wood  
*St. Luke's Church, Cleveland*

**Lay Professionals Committee**

Nancy Baxter  
*Christ Church, Kent*

Ned K. Brooks  
*St. James Church, Wooster*

George Clarke  
*St. Philip's Church, Akron*

David Davies  
*St. Luke's Church, Cleveland*

Kate Gillooly (Chair)  
*St. Paul's Church, Cleveland Heights*

The Rev. Priscilla Grant (Staff)  
*Canon for Ministry, Diocese of Ohio*

Betty Kondrich  
*Church of the Good Shepherd,  
Lyndhurst*

Sam McDonald  
*St. Paul's Church, Cleveland Heights*

Edward M. Metz  
*Trinity Cathedral, Cleveland*

N. Jean Parke  
*St. Luke's Church, Niles*

Robert Pierce  
*Christ Church, Oberlin*

Heather D. Wood  
*St. Luke's Church, Cleveland*

**Mission Strategy Task Force**

The Rev. Collins E. Asonye  
*Rector, Meade Memorial Church,  
Alexandria, VA*

The Rev. Lisa E. Hackney  
*Associate Rector, St. Paul's,  
Cleveland Heights*

Florence Hosler  
*St. James' Church, Boardman*

Catherine Huber  
*St. Andrew's Church, Toledo*

The Rev. Alan C. James (Staff)  
*Canon to the Ordinary,  
Diocese of Ohio*

The Rev. Evelyn N. Manzella  
*Rector, St. James', Wooster*

David O'Halloran  
*St. Paul's Church, Cleveland Heights*

The Rev. Christine E. Schutz  
*Rector, Trinity, Findlay*

Reed Stith (Consultant)  
*Christ Church, Hudson*

The Rev. Brian S. Suntken  
*Rector, Christ Church, Hudson*

Dale Traven  
*St. Mark's Church, Shelby*

**New Church Planting Committee**

David Dismer  
*Grace Church, Mansfield*

The Rev. Patricia L. Hanen, Ph.D.  
*Rector, New Life, Uniontown*

Patricia B. Kilpatrick (Chair)  
*Christ Church, Hudson*

Gene Maio  
*New Life Episcopal  
Church, Uniontown*

The Rev. Stephanie Pace

**Ohio Council of Churches**  
**Term Expires 193<sup>rd</sup> Convention**  
Dottie Rieman  
*St. Matthew's Church, Brecksville*

**Peace and Justice Commission**  
Jennifer Boswell  
*St. Peter's Church, Lakewood*

Chester Bowling  
*St. Paul's Church, Norwalk*

Judy Canan  
*Grace Church, Ravenna*

Rosetta Craig  
*St. Paul's, Cleveland Heights*

The Rev. Carol C. Duncan  
*Deacon; Development Coordinator,  
ICAN, Inc.*

The Rev. Patricia L. Hanen, Ph.D.  
*Rector, New Life, Uniontown*

Marie Harkey  
*Trinity Church, Toledo*

Connie Laessig  
*Trinity Cathedral, Cleveland*

Liz Lambert  
*Church of the Epiphany, Euclid*

Jane Macarthy  
*Christ Church, Oberlin*

Dottie Rieman (Chair)  
*St. Matthew's Church, Brecksville*

Jean Schlecht  
*Christ Church, Warren*

Beverly Scipio  
*St. Andrew's Church, Cleveland*

Ingrid von Wachholtz-Reese  
*St. Paul's, Cleveland Heights*

**Planned Giving Council**  
P. Thomas Austin  
*Trinity Cathedral, Cleveland*

Lael Carter (Chair)  
*St. Paul's, Cleveland Heights*

Warren Kahn  
*Trinity Church, Findlay*

Susan M. Leishman (Staff)  
*Chief Financial Officer,  
Diocese of Ohio*

David Robertson  
*St. Paul's Church, Cleveland Heights*

Michelle Tognetti  
*St. Paul's Church, Akron*

The Rev. Robert Walcott

**Provincial Synod  
Representatives**  
**Term Expires 194<sup>th</sup> Convention**

Robert Bennett  
*Harcourt Parish, Gambier*

R. Stephen Gracey  
*St. Luke's Church, Cleveland*

The Rev. T. Conrad Selnick  
*Rector, St. Christopher's-by-the-  
River, Gates Mills*

**Shared and Strategic  
Ministries Committee**  
The Rev. David M. Bargetzi (Chair)  
*Urban Missioner, Episcopal West  
Side Shared Ministry, Cleveland*

The Rev. Dr. J. Paul Board  
*Rector, St. Paul's, Maumee*

The Rev. Dr. Barbara L. Bond  
*Rector, St. Paul's, Canton*

The Rev. Patricia L. Hanen, Ph.D.  
*Rector, New Life, Uniontown*

The Rev. Daniel Longworth Orr  
*Priest-in-Charge, St. Paul's, Fremont*

The Rev. R. Stephen Sedgwick  
*Rector, Redeemer, Lorain*

**Stewardship Network Committee**  
P. Thomas Austin  
*Trinity Cathedral, Cleveland*

Lael Carter  
*St. Paul's Church, Cleveland Heights*

Richard Goodale  
*St. James Church, Painesville*

The Rev. Alan C. James (Staff)  
*Canon to the Ordinary,  
Diocese of Ohio*

The Rev. G. Kelly Marshall  
*Rector, St. James's, Boardman*

Kathy Scheel  
*St. James' Church, Boardman*  
The Rev. Daniel H. Schoonmaker  
*Rector, St. Hubert's, Kirtland Hills*

Doug Skladan  
*St. Andrew's Church, Elyria*

Reed Stith  
*Christ Church, Hudson*

Michelle Tognetti  
*St. Paul's Church, Akron*

The Rev. Robert Walcott

Elizabeth Wrona  
*St. John's Church, Youngstown*

**Vocational Discernment**  
Fran Carr (Co-Chair)  
*St. Mark's Church, Toledo*  
The Rev. Gayle L. Catinella  
*Rector, St. Thomas, Berea*  
The Rev. Priscilla Grant (Staff)  
*Canon for Ministry, Diocese of Ohio*

Susan Lowrey (Co-Chair)  
*Trinity Church, Toledo*

Linda Martin  
*Christ Church, Hudson*

Marilyn McDonald  
*Trinity Cathedral, Cleveland*

The Rev. Peter W. Nielsen, III  
*Deacon, Executive Director, Cedar  
Hills Camp & Conference Center*

Susannah Perkinson  
*Church of Our Saviour, Akron*

The Rev. R. Stephen Sedgwick  
*Rector, Redeemer, Lorain*

Celia C. Smart  
*St. James Church, Wooster*

The Rev. Karl Stevens  
*Priest-in-Charge, St. Paul's, Mt.  
Vernon; Chaplain, Kenyon College*

## **The Staff of the Diocese of Ohio**

### **The Office of the Bishop**

The Rt. Rev. Mark Hollingsworth, Jr., *Bishop of Ohio*  
The Rt. Rev. David C. Bowman, *Assisting Bishop*  
The Rt. Rev. William D. Persell, *Assisting Bishop*  
The Rt. Rev. Arthur B. Williams, Jr., *Assisting Bishop*  
The Rev. Alan C. James, *Executive Officer*  
Eva Cole, *Administrative Assistant*  
Virginia Krumholz, *Archivist*

### **The Office for Congregations and Christian Formation**

The Rev. Brad Purdom, *Canon for Congregations*  
The Rev. Vincent Black, *Canon for Christian Formation*  
Mary Ann Semple, *Resource Center Interim Director*  
Antoinette Taylor, *Administrative Assistant*  
Rita Rozell, *Administrative Assistant*

### **The Office of Christian Vocations**

The Rev. Percy Grant, *Canon for Ministry*  
Rita Rozell, *Administrative Assistant*

### **Mission**

The Rev. Mark K. J. Robinson, *Canon for Mission*  
Debra Sudy, *Administrative Assistant*

### **The Office of Communications**

Martha Wright, *Director of Communications*  
Kristin Crites, *Graphic Designer/Administrative Assistant*

### **The Office of Stewardship & Development**

The Rev. Alan C. James, *Parish Stewardship Campaigns*  
Lael Carter, *Development Officer*  
Debra Sudy, *Administrative Assistant*

### **Finance Office**

Susan Leishman, *Chief Financial Officer*  
Janine Johnson, *Accountant*  
Brenda Koenig, *Accountant*  
P. Thomas Austin, *Treasurer*

# Proceedings of the 193<sup>rd</sup> Annual Convention of the Diocese of Ohio

**November 14, 2009, Trinity Commons, Cleveland**

The **Rt. Rev. Mark Hollingsworth, Jr.**, 11<sup>th</sup> bishop of the Diocese of Ohio called the 193<sup>rd</sup> Annual Convention of the Diocese of Ohio to order at 9:07 A.M., and the Convention was organized for business. **Bishop Hollingsworth** called on the Rev. Dr. **Brian Wilbert** (Christ Church, Oberlin) Secretary of Convention, who reported a quorum.

The Rev. **Alan James**, canon to the ordinary, announced a correction to Resolution 1 and added Resolution 5 on international partnerships. He also noted that **Roderick Adams** (St. Andrew's, Cleveland) had been nominated for trustee and **Rebecca Montague** (Grace, Sandusky) had been nominated for Diocesan Council. He thanked the participants of the Friday afternoon work projects.

Bishop Hollingsworth thanked the staff of the cathedral for hosting the convention, and called on the Very Rev. Tracey Lind to welcome the delegates. He then called on **Damon Hickey** (St. James, Wooster) who moved to adopt the rules of order. The rules of order were seconded and passed with the following changes:

- insert on page 8 line 28a: reports are announced by title to Convention,
- a resolution was proposed, seconded and passed with a voice vote extending privileges of the floor to assisting bishops in the Diocese of Ohio, the Chief Financial Officer, the Director of Communications, the Diocesan Consultant for Development, non-canonically resident clergy serving as Interim or Priest-in-Charge in a cure, Lutheran pastors with pulpits in Episcopal churches, the president of the Diocesan Episcopal Church Women, lay members of the Standing Committee, lay members of the Diocesan Council, lay members of the Trustees, lay deputies and provisional deputies to the General Convention, recipients of the Bishop's Medal, and Special Youth Representatives.

The Rev. Dr. **Brian K. Wilbert** explained the procedures for voting by a show of hands or by orders. Delegates shall raise their convention folders; he instructed the delegates to pass on their folders to any alternates taking their place. No new folders or ballots will be made available. Nametags cannot be replaced.

**Bishop Hollingsworth** then called upon the Rev. Dr. **Brian Wilbert** to report on parish compliance with canons. Dr. **Wilbert** reported that no churches were in arrears in clergy pensions; the following churches were not current in their diocesan assessments and therefore, not eligible for seat, voice, or vote:

- Church of the Holy Spirit, Akron
- St. Barnabas, Bay Village
- St. Anne's, Madison
- St. Timothy's, Massillon
- St. Luke's, Akron
- Church of the Transfiguration, Cleveland

No churches are in arrears in payment of clergy pensions

The following church is in arrears in payment of its lay pension report and payments, and will be eligible for seat and voice, but not vote:

- Old Trinity, Tiffin

The following church has not submitted its parochial reports:

- St Johns, Napoleon

The following churches have not submitted their audits:

- St John's, Napoleon
- St. Paul's, Oregon
- St. Paul's, Steubenville

- Old Trinity, Tiffin
- All Saints, Toledo
- St. Augustine's, Youngstown

Dr. **Wilbert** then made the following appointments:

- **Assistant Secretaries:** Eva Cole, Brenda Koenig, Martha Wright
- **Counters:** Eva Cole, Susan Cowling, Kristin Crites, Janine Johnson, Elizabeth Limmex, Jennifer Mitchell, Rita Rozell, Anne Yug
- **Tellers:** Audra Abt, Josh Butler, Chuck Catonese, Zeke Coughlin, Rosalyn Hughes, Brenda Koenig, Sue Leishman, Linda McCorkle, Jill Sonick, Jane Trager, the Rev. Bob Weaver

**Bishop Hollingsworth** called upon **Rebecca Wilson** (Our Saviour, Akron,), chair of the Nominating Committee. She placed in nomination those names put forward by the committee with any additional names received by the Secretary or from the floor for the following offices:

Trustee of the Diocese (1 person for a 5-year term)

**Roderick Adams** (St. Andrew's, Cleveland)

Standing Committee (1 clergy and 1 lay for 4-year terms)

From the Clerical Order:

The Rev. **Evelyn Manzella** (St. James Church, Wooster)

The Rev. Dr. **Brian Wilbert** (Christ Church, Oberlin)

From the Lay Order:

**Sue Perkinson** (Church of Our Saviour, Akron)

**Becky Roth** (Trinity Church, Toledo)

Diocesan Council (2 clergy and 2 laity for 3-year terms)

From the Clerical Order:

The Rev. **Howard Humphrey, Sr.** (St. Martin's, Chagrin Falls)

The Rev. **Ken Pepin** (St. Timothy's, Perrysburg)

From the Lay Order

**Linda Martin** (Christ Church, Hudson)

**Ernie Petrey** (St. Paul's, Cleveland Heights)

Episcopal Community Services Development Council (1 clergy and 3 laity for 3-year terms)

From the Lay Order:

**Lorraine Angus** (Trinity Cathedral, Cleveland)

**Cheryl Gray** (St. Martin's, Chagrin Falls)

**Suzanne Palmer** (St. Timothy's, Macedonia)

From the Clerical Order:

The Rev. **Kelly O'Connell** (St. Mark's, Toledo)

Cathedral Chapter (1 clergy and 1 lay for 2-year terms):

From the Lay Order:

**Pam O'Halloran** (St. Paul's, Cleveland Heights)

From the Clerical Order:

The Rev. **Dan Schoonmaker** (St. Hubert's, Kirtland Hills)

The Rev. Dr. **Brian Wilbert** then instructed the delegates in voting procedures. The first ballot was taken.

The Convention Eucharist followed the first ballot. **Bishop Hollingsworth** delivered the Episcopal Address.

Following the Eucharist and a break, **Bishop Hollingsworth** called on the Diocesan Treasurer to give the Treasurer's report. Mr. **Tom Austin** gave the Treasurer's Report for 2009. He discussed the options for the Joint Investment Fund and explained in detail the expenses and income of the diocese as published in the Convention Handbook. He noted that assessments were lower in 2009, but the diocese is in excellent financial condition, since it is not spending as much. Cedar Hills is expected to break even for the year, which will be March through September. Trinity Commons Books and Gifts experienced a greater loss than expected, and the bookstore was closed in October.

The Very Rev. **Tracey Lind** then nominated **Tom Austin** for Treasurer of Convention. He was elected unanimously. **Bishop Hollingsworth** called upon **Midge Brittingham** (Christ Church, Oberlin) to nominate the Rev. Dr. **Brian Wilbert** for Secretary of Convention. He was elected unanimously.

**Bishop Hollingsworth** then called upon the Rev. **Albert Jennings** (St. Timothy's, Macedonia) and **Linda Heitger** (St. Pauls, Canton) and the Rev. **Chris McCann** (St. Luke's, Chardon) to report on the Deanery Review Committee. **Jennings** reported that the Review Committee determined that the Deanery system was not using its resources, nor was its purpose clear. People felt the deaneries did not have motivation and the churches were too far apart. Only one of the 10 deaneries had an active council, but all had active ECW groups.

After many interviews, the Review Committee recommended creating eight Mission Area Councils, hoping to create relationships of affinity between missionary clusters and cooperation among parishes in mission work. The Missionary Councils will have a representative on Diocesan Council, and potentially will increase the engagement of laity in the work of mission. They will meet at least 4 times per year.

**Bishop Hollingsworth** then called on the Rev. **Keith Owen** (St. Peter's, Lakewood) to report on the Committee on Constitution and Canons. He explained the process for amending the Constitution and Canons, and proposed an amendment to the Constitution. The Amendment to the Constitution was a result of a request from the Ohio Council of Churches asking that lay delegates be replaced by bishops or an appointed member of their staff (Article V, section 3). The amendment brings the Diocesan Constitution into alignment with the Ohio Council of Churches' by-laws. A change in the constitution requires a two-thirds majority in both houses. The amendment passed by two thirds in both orders by a voice vote.

The first Proposed Amendment to the Canons replaced the current Title II Canon 3 with a new Title II canon 3: Of Mission Areas (page 25 of handbook). Discussion of the proposed amendment ensued, with a request that the Youngstown Mission area be able to change its name, since many of the churches are not in Youngstown. The Very Rev. **Tracey Lind** (Trinity Cathedral, Cleveland) moved to continued debate, which was seconded and passed. The debate continued for 10 minutes, then was voted upon. The first proposed amendment to the canons carried.

**Bishop Hollingsworth** then called upon candidates for Holy Orders and clergy new to the diocese, in new positions, or those who have retired since the last Convention to come to the front.

Candidates for Holy Orders are:

Senior seminarians:

- **Audra Abt**, Bexley Hall
- **Zeke Coughlin**, Bexley Hall
- **Andrea Dedmon**, General Seminary
- **Gia Hayes Martin**, Church Divinity School of the Pacific

Deacon Postulants:

- **Josh Butler**
- **Anne Pillot**
- **Jane Trager**



Change in orders:

- **Diane Carroll**, assistant at Holy Trinity, Rittenhouse Square, Philadelphia
- **Daniel Knaup**, received from the Roman Catholic priesthood and serving as command chaplain, United States Army

Ordained to diaconate:

- **Vincent Black**
- **George Baum**
- **Matthew Humm**
- **David Nelson**
- **Jennifer Leider**

New clergy in the diocese:

- **Mark Robinson**, Canon for Mission, Bishop's staff
- **Tom Hawkins**, Rector, St. Marks, Canton
- **Himie-Budu Shannon**, Rector, St. Andrew's, Cleveland
- **Katie Wright**, Rector, St. Andrew's, Elyria
- **Vanessa Clark**, Rector, St. James, Painesville
- **Michael Wiechers**, Pastor, St Thomas, Port Clinton and Peace Lutheran Church, Port Clinton
- **Heather Hill**, Rector, All Saints, Parma
- **Joe Kovitch**, Lutheran/Episcopal Campus Minister,
- **Thomas Jackson**, Extended supply, Christ Church, Geneva, and St. Peter's, Ashtabula
- **Will Mebane**, Curate, Trinity Cathedral

Retired:

- **Ernie Matijasic**, Grace Church, Sandusky
- **The Rev. Greg Griffith**, Trinity Church, Coshocton
- **John Horner**, St. John's, Youngstown

Clergy in new assignments include:

- **Elaine McCoy**, Interim, Grace Church, Sandusky,
- **Gene Pearson**, Priest-in-Charge, Grace Church, Defiance
- **Joy Caires**, Assistant, Church of Our Saviour, Akron
- **Jeremiah Williamson**, Rector, St. Andrew's, Toledo
- **Erv Smuda**, Interim, St. John's, Youngstown
- **Brad Purdom**, Canon for Congregations, Bishop's staff
- **Karl Stevens**, Priest-in-Charge, St. Paul's, Mt. Vernon
- **Pat Hanen**, Rector, New Life, Uniontown
- **Diana Cook**, Priest-in-Charge, Trinity Church, Coshocton

**Bishop Hollingsworth** then introduced and welcomed the Rt. Rev. **Ernest Shalita** from the Diocese of Muhubura in Uganda who is visiting St. Peter's, Ashtabula.

Convention then broke for lunch.

Convention was called back to order at 1:25 P.M. **Bishop Hollingsworth** called on the Rev. **Brian Wilbert** for a report on the first ballot. For the contested positions, 297 votes were cast; 149 were required for election. For Standing Committee in the Lay Order, **Sue Perkinson** received 144 votes, and **Becky Roth** received 126 votes; therefore no one was elected. In the clerical order for Standing Committee, the Rev. **Evelyn Manzella** was elected with 159 votes; the Rev. **Brian Wilbert** received 107 votes. The Rev. **Evelyn Manzella** was therefore elected to Standing Committee.

**Bishop Hollingsworth** then called on **Joe Bridges** (New Life, Uniontown) to report on the Commission on Global and Domestic Mission's recommendation for international partnerships. Dr. **Bridges** talked

about the process for determining work that would respond to the MDGs, fulfill diocesan goals, and continue work that has been ongoing. The CGDM therefore recommended investigating two partnerships: the Diocese of Belize and the Diocese of Tanga in Tanzania.

**Bishop Hollingsworth** called upon the Rev. **Stephen Sedgwick** (Church of the Redeemer, Lorain), chair of the Committee on Resolutions. He presented the resolutions in order. R-1 on Clergy Compensation was corrected to change line 5, which said, "At least \$45,000 for assisting clergy ordained less than five years" to "at least \$45,000 for assisting clergy ordained less than three years," which is required by canon. **Sedgwick** proposed passage of R-1. It was seconded and passed with no discussion.

**Sedgwick** then proposed R-2, which acknowledged the end of the ministries at St. Andrew's, Canfield, Grace, Galion, and Trinity, Bryan, and declared them to be extinct. The resolution to accept their closing was moved, seconded, and passed unanimously.

**Sedgwick** then proposed resolution R-3, which calls on the Diocese to affirm the action of the 76<sup>th</sup> General Convention in adopting the Charter for Lifelong Christian Formation, by urging the Office of Christian Formation to support people in their lifelong faith journey. The resolution was moved, seconded, and passed unanimously.

Resolution R-4 called on the Governor and Legislature of the State of Ohio to impose a moratorium on capital punishment by petitioning the Governor, asked parishioners to pray for families, friends, and murder victims. **Sedgwick** moved the resolution; it was seconded and passed.

Resolution R-5 asked for a preliminary exploration of forming a partnership with Dioceses of Belize and Tanga. **Sedgwick** moved the resolution; it was seconded and passed.

**Bishop Hollingsworth** then called on **Darrell Knapp** (St. James, Painesville), chair of the assessment review committee. **Knapp** explained that **Bishop Hollingsworth** had asked for a study of the assessment process in 2006. The study group recommended by last year's convention was asked to look at the current funding mechanism and how assessment was calculated according to last year's income. They realized the current funding mechanism burdens parishes, and that NOI (net operating income) is difficult to calculate on a monthly basis. Keeping in mind the mandate to simplify administrative processes, the committee proposed using NOE or net operating expenses less diocesan assistance and outreach monies. That lowers the base of what a parish is assessed on. The purpose was to keep the budget revenue neutral, so the graduated rated tables and percentages changed. Some parishes will pay slightly different amounts, approximately +/- \$1,000. The committee attempted to find a balance between generosity and accountability by recommending that all parishes in arrears get seat and voice but not vote. The canon will define arrears more generously, as well. Parishes must be current through the month of June, rather than the month of August. This relief should help parishes get through lean summer months. This proposed amendment has the goals of simplification, inclusiveness, and promotes generosity of community. **Knapp** thanked all the members of the assessment committee: **Tom Austin** (Trinity Cathedral); **Chip Billow** (St. Paul's, Akron); **Bill Haywood**, (St. Paul's, Maumee), the Rev. **Alan James** (Bishop's staff); **Sue Leishman** (Bishop's staff); the Rev. **Kelly Kirby** (St. Andrew's, Mentor); **Bob Larson** (St. Paul's, Cleveland Heights); **Tina Monreal** (Trinity Cathedral); the Rev. **Keith Owen** (St Peter's, Lakewood).

The report recommended changing the assessment formula starting on January 1, 2010, from assessing normal operating income (NOI) to assessing normal operating expenses (NOE), as follows:

- 10 percent of the first \$50,000 of NOE of a parish;
- 13 percent of that portion of the NOE above \$50,000 and up to \$150,000;
- 16 percent of that portion of the NOE above \$150,000 and up to \$250,000;
- 19 percent of that portion of the NOE above \$250,000.

NOE is defined as all other operating expenses less assistance from the diocese for operating budget in the line-by-line instructions for the preparation of the 2008 Parochial Report as provided by the

Episcopal Church. (See Title I Canon 14: Of the Diocesan Fund).

**Tom Green** (Christ Church, Hudson) proposed an amendment that no parishes ever have to pay more on their annual assessment than \$1500 over what they paid in 2007. **Stephen Gracey** (St. Luke's, Cleveland), spoke against the amendment because the canon would have to refer back to 2007 indefinitely.

The Rev. **Bob Weaver** also spoke against the amendment, saying, "let's not lock ourselves in." The Rev. **Brian Gillooly**, (Trinity, Cathedral) also spoke against the amendment. The amendment was voted on and failed.

The Rev. **Meghan Froelich** said that approximately 23 parishes would be affected and have to pay more. She asked if a parish running a deficit would be assessed. Assessment would be calculated only on funds spent.

There was a motion to continue the debate for 5 minutes, which was seconded and passed. The Rev. **Greg Sammons** complimented the assessment review as a document that was fair and just. The Rev. **Brian Suntken** said parishes should only be called to tithe and asked Convention to vote the amendment down.

Convention then voted on the second proposed amendment to the Canons, and it carried.

The Rev. **J. Paul Board**, (St. Paul's, Maumee) introduced the third proposed amendment to the Canons, which added the words, "The rector shall be responsible for hiring, terminating, and providing direct supervision of all paid employees of the parish, or the rector may delegate these tasks to others." The rationale for the canon is to clarify the lines of authority, giving the rector sole authority for employees.

**John West** (Church of the Good Shepherd, Lyndhurst) noted that this was a change from The Episcopal Church Canons, which gives the vestry authority over temporal issues. The Rev. **Alan Gates** (St. Paul's, Cleveland Heights), spoke against the proposed change. The Rev. **Wanda Ray** (Christ Church, Huron) spoke in favor of it, citing the need for loyalty to the rector. The Rev. **Julie Fisher** (Christ Church, Kent) also spoke in favor of the change. **Brandon Hooper** (St. Matthew's, Toledo) moved to recommit the proposed change to the Committee on Constitution and Canons. The motion to recommit failed. A vote was taken on the proposed amendment and it failed also.

**Bishop Hollingsworth** then called on **Mike Bickerton** (St. Peter's, Lakewood) to give the report of the Trustees.

He reported that the Trustees had received advice from a number of people and conducted a search for a firm to help them in trying to get better returns on investments. The trustees made the decision to retain Hartland and Company. **Bickerton** introduced **Tom Hartland**, who explained that his 20-year-old company has \$90 billion invested, including many nonprofits. They are independent advisors and deal with socially responsible investments, and their assets allocation involves equity and fixed income.

**Bishop Hollingsworth** then called on **Chip Billow** (St. Paul's, Akron) as the representative on Diocesan Council, to present the 2010 program and budget. He then proposed that Convention accept the budget as presented. The Rev. **Himie-Budu Shannon** (St. Andrew's, Cleveland) asked how much of the budget was allocated for youth work. **Bishop Hollingsworth** said figuring that out was complicated and he couldn't do it at that time. The 2010 program and budget passed unanimously.

The reports of the following commissions and committees were filed by title:

- Trustees
- Standing Committee
- Diocesan Council
- Loans and Grants
- Commission on Ministry

- Christian Formation Commission
- Episcopal Community Services
- Task force on Human Trafficking
- Cedar Hills Camp and Conference Center.

**Bishop Hollingsworth** asked if there was any unfinished business. **Bishop Bowman** rose to say it was his birthday the next day. The Convention sang Happy Birthday to him.

**Bishop Hollingsworth** announced that with 154 votes, **Sue Perkinson** (Our Saviour, Akron) was elected to the lay order of the Standing Committee. He nominated the Rev. **Liddy Hoster** (Trinity, Toledo); **Charles Catonese** (St. Patrick's, Brunswick); and **Brian Kirby** (St. Andrew's, Mentor) to the Commission on Ministry; and he thanked all those who had completed terms on diocesan committees and commissions.

**Bishop Hollingsworth** then called on the Rev. **Stephen Sedgwick**, (Church of the Redeemer, Lorain) for the resolutions of courtesy.

The 193<sup>rd</sup> Convention of the Diocese of Ohio adjourned at 4:35 P.M.

## The Bishop's List of Clergy



193<sup>rd</sup> Annual Diocesan Convention  
November 13-14, 2009  
The Bishop's List of Clergy

The following is the Bishop's List of Clergy eligible to vote at the Annual Convention. Please remember that if you are on this list, you are expected to be at Convention. (*Title I, Canon 1. Sec. 1(a) It shall be the duty of all Clergy entitled to vote in the Convention to attend the same...*)

If for any reason you find that you cannot attend, you must request to be officially excused by the Bishop prior to Convention so that voting privileges at subsequent conventions are not jeopardized.

If you are canonically resident but not on this list and would like to be, you may petition the Bishop by October 30, 2009 for inclusion.

From the Constitution and Canons of The Episcopal Church in the Diocese of Ohio:

### Article II: The Convention

Sec. 2. *Members of any Convention shall be:*

- C. *All deacons and presbyters not under discipline who are canonically resident in the Diocese and in charge of, or designated as assistant clergy in, any parish in canonical union with the Diocese, or employed by the Diocese, or certified to the Convention by the Ecclesiastical Authority of the Diocese as serving the mission of the Church.*

**Alexis, M. Judith**  
**Anderson, Philip A., M.D.**

**Andrew, Robert N., Sr.**  
**Angus, Caroline G.**  
**Ashby, Joseph L.**  
**Ashby, Kay N.**  
**Asonye, Collins E.**  
**Baker, J. Jeffrey**  
**Bargetzi, David M.**  
**Baum, George R.**  
**Belton, Allan E.**

Diocese of Connecticut  
Deacon, St. Paul's, Cleveland Heights; Physician,  
University Hospitals, Cleveland  
Retired; Pastoral Associate, St. Barnabas' Church, Bay Village  
Retired  
Rector, Grace, Mansfield  
Extended Supply, St. Matthew's, Ashland  
Rector, Meade Memorial Church, Alexandria, VA  
Priest in Charge, St. Stephens' Shared Ministry  
Urban Missioner, Episcopal West Side Shared Ministry, Cleveland  
Deacon-in-Charge, St. Patrick's, Brunswick  
Retired; Church of the Epiphany, Spartanburg, SC

<b>Bergmann, J. Stephen</b>	Retired; Part-time Pastoral Assistant, St. Peter's, St. Louis, Missouri
<b>Bigley, Mark C.</b>	
<b>Black, Vincent E.</b>	Canon for Christian Formation, Diocese of Ohio
<b>Board, J. Paul</b>	Rector, St. Paul's, Maumee
<b>Bond, Barbara L.</b>	Rector, St. Paul's, Canton
<b>Brown, James L.</b>	Deacon, St. Andrew's, Mentor
<b>Brownridge, Walter B.A.</b>	Associate Dean for Community Life, School of Theology at University of the South
<b>Burt, John H.</b>	Eighth Bishop of Ohio, Retired
<b>Caires, Joy M.</b>	Assistant Rector, Our Saviour, Akron
<b>Carroll, Diana E.</b>	Assistant to the Rector, Church of the Holy Trinity, Ritten House Square, Philadelphia, PA
<b>Carson, Mary C.</b>	Associate Executive Director, Lutheran Chaplaincy Services
<b>Catinella, Gayle L.</b>	Rector, St. Thomas, Berea
<b>Clark, Vanessa E. B.</b>	Rector, St. James', Painesville
<b>Cleaver-Bartholomew, Dena</b>	Associate Rector, St. Paul's, Akron
<b>Colegrove, J. Kip H.</b>	
<b>Colwell, Kirby P., II</b>	Deacon, St. Paul's, Cleveland Heights; Diocesan Coordinator for Episcopal Relief & Development
<b>Cook, Diane E.</b>	Priest in Charge, Trinity, Coshocton; Chaplain, Ohio Eastern Star Home, Mt. Vernon
<b>Cooney, James F.</b>	Retired
<b>D'Alesandre, Peter J.</b>	Retired; Part-time Vicar, Grace, Yantic, CT
<b>D'Anieri, Margaret C.</b>	Rector, St. Paul's, Norwalk
<b>Dautel, Terrence P.</b>	Supply
<b>Dudley, Michael D.</b>	Retired; Priest-in-Residence, St. James, Somerville, MA
<b>Duncan, Carol C.</b>	Deacon; Development Coordinator, ICAN, Inc.
<b>Evans, Carol S.</b>	Rector, Grace, Ravenna
<b>Faass, Peter</b>	Rector, Christ Church, Shaker Heights
<b>Fisher, Julie B.</b>	Rector, Christ Church, Kent
<b>Flores, Lisa C.</b>	Associate Rector, Christ Church, Grosse Pointe, MI
<b>Froehlich, Meghan F.</b>	Rector, Church of Our Saviour, Akron
<b>Funston, C. Eric</b>	Rector, St. Paul's, Medina
<b>Gaston, Paul L., III</b>	Deacon, Christ Church, Hudson; Kent State University
<b>Gates, Alan M.</b>	Rector, St. Paul's, Cleveland Heights
<b>Gillooly, Bryan C.</b>	Deacon; Bellaire-Puritas Development Corp.
<b>Gingher, Richard H.</b>	Retired



<b>Glanville, Polly A.</b>	Deacon, St. Paul's, Akron; Dental Hygienist
<b>Grant, Priscilla</b>	Canon for Ministry, Diocese of Ohio
<b>Green, Gretchen H.</b>	Deacon
<b>Greenwood, W. Merritt</b>	
<b>Greer, James G., Jr.</b>	Retired
<b>Grew, J. Clark, II</b>	Tenth Bishop of Ohio, Retired
<b>Griffith, Gregory E.</b>	Retired
<b>Griffith, Robert L., Jr.</b>	Curate, St. Paul's, Brooklyn NY
<b>Griswold, Edwin A.</b>	Retired
<b>Grose, Fayette P.</b>	Retired
<b>Hackney, Lisa E.</b>	Associate Rector, St. Paul's, Cleveland Heights
<b>Hall, V. Donald</b>	Rector, St. Luke's, Niles
<b>Hanen, Patricia L., Ph.D.</b>	Rector, New Life, Uniontown
<b>Harris, Henry G.</b>	Rector, St. Timothy, Massillon
<b>Harvey, Robbin W.</b>	Deacon, Retired
<b>Hawkins, Thomas E.</b>	Rector, St. Mark's Church, Canton
<b>Hayden, John H.</b>	Retired
<b>Herkner, Robert T., Jr.</b>	Retired
<b>Herron-Piazza, Katharine</b>	Curate, St. John's, Larchmont, NY
<b>Hobbs, W. Ebert</b>	Retired; part-time Chaplain, Sunnybrook Hospital, Toronto; Honorary Assistant, St. Paul's, Toronto
<b>Holliger, John C.</b>	Rector, St. Paul's, Marion
<b>Hollingsworth, Mark, Jr.</b>	Bishop, Diocese of Ohio
<b>Horner, John S.</b>	Retired
<b>Horton, Cathy</b>	Associate Priest, Trinity Cathedral
<b>Hoster, Elizabeth M.</b>	Rector, Trinity, Toledo
<b>Humm, R. Matthew</b>	Deacon in Charge, St. Alban's; Youth Minister, St. Paul's, Cleveland Heights
<b>Humphrey, Howard M., Jr.</b>	Rector, St. Martin's, Chagrin Falls
<b>Ifill, Angela S.</b>	Missioner for the office of Black Ministries, Episcopal Church Center
<b>James, Alan C.</b>	Canon to the Ordinary, Diocese of Ohio
<b>Jennings, Albert A.</b>	Rector, St. Timothy's, Macedonia
<b>Jennings, Gay C.</b>	Associate Director, CREDO Institute
<b>Jones, William H.</b>	Retired
<b>Keblesh, Joseph, Jr.</b>	Rector, St. Matthew's, Toledo
<b>Keller, John S.</b>	Retired; Interim Pastor, Ascension, Lakewood
<b>Kelly, S. Elizabeth</b>	Director of Spiritual Care, Blanchard Valley Healthcare Association; Chaplain to Clergy Spouses/Partners

<b>Kimble, John R.</b>	Retired
<b>Kirby, Kelly</b>	Rector, St. Andrew's, Mentor
<b>Knaup, Daniel J., Jr.</b>	Command Chaplain, United States Army Reserve, 643 <sup>rd</sup> Regional Support Group
<b>Leider, Jennifer C.</b>	
<b>Lind, Tracey</b>	Dean, Trinity Cathedral, Cleveland
<b>Manzella, Evelyn N.</b>	Rector, St. James', Wooster
<b>Maree, Donna L.</b>	Rector, Christ Church, Warren
<b>Marshall, G. Kelly</b>	Rector, St. James's, Boardman
<b>Mason, David R.</b>	Assisting, St. Paul's, Cleveland Heights; Professor, John Carroll University
<b>Matijasic, Ernest G.</b>	Retired
<b>Maughan, M. Webster</b>	Chaplain, Stein Hospice Service, Sandusky; Interim Pastor, St. Paul's, Put-in-Bay
<b>Maxwell, Barbara J.</b>	Deacon, Episcopal West Side Shared Ministry
<b>Mayfield, Donna W.</b>	Spiritual Care Coordinator, Hospice of Visiting Nurse Association
<b>McCallum, Lynn C.</b>	Retired
<b>McCann, Christopher R.</b>	Priest-in-Charge, St. Luke's, Chardon
<b>McCoy, Elaine, Ph.D.</b>	Interim Rector, Grace, Sandusky
<b>McDermott, Jane L.</b>	Supply
<b>McElroy, Gary A.</b>	Retired
<b>Mitchener, Gary A.</b>	Retired
<b>Moorer, Dawson D.</b>	Retired
<b>Moore-Tasy, Beverly A.</b>	Priest-in-Charge, All Saints, Toledo
<b>Nelson, David S.</b>	Deacon-in-Charge, St. John's, Bowling Green
<b>Nevels, Harry V., Jr.</b>	Retired; Part-time Vicar/Priest-in-Charge at St. James', Emporia, VA, St. Thomas', Freeman, VA, St. Paul's College, Lawrenceville, VA
<b>Nielsen, Peter W., III</b>	Deacon, Executive Director, Cedar Hills Camp & Conference Center
<b>Nusser-Telfer, Hiltrude, Bcc</b>	Chaplain, Flower Hospital, Toledo
<b>O'Connell, Kelly A.</b>	Rector, St. Mark's, Toledo
<b>O'Keefe, Lloyd F.</b>	Retired
<b>Orr, Daniel Longsworth</b>	Priest-in-Charge, St. Paul's, Fremont
<b>Owen, G. Keith, II</b>	Rector, St. Peter's, Lakewood
<b>Pace, Stephanie</b>	
<b>Pearson, C. Eugene</b>	Retired; Priest-in-Charge, Grace, Defiance; Chaplain, Kingston Healthcare, Toledo

<b>Pepin, Kenneth R.</b>	Rector, St. Timothy's, Perrysburg
<b>Perkinson, Edward M.</b>	Marriage and Family Therapist
<b>Phillips, Marie</b>	Rector, Epiphany, Euclid
<b>Pitman, Ralph W., Jr.</b>	Retired; Community Re-Entry Program, Lutheran Metropolitan Ministries
<b>Pruitt, Mark J.</b>	Rector, St. Paul's, Akron
<b>Pumphrey, David W.</b>	Retired
<b>Purdom, A. Bradford, III</b>	Canon for Congregations, Diocese of Ohio
<b>Rackley, M. Kathryn</b>	Associate Rector, Christ Church, Hudson
<b>Ralston, D. Darwin</b>	Retired
<b>Rankin, Deborah T.</b>	Rector, St. John's, Cuyahoga Falls
<b>Ransom, Charles W.</b>	Retired
<b>Ray, Wanda</b>	Rector, Christ Church, Huron
<b>Rich, Nancy W.</b>	Retired
<b>Richey, Leon E.</b>	Retired
<b>Rogan, Donald L.</b>	Retired
<b>Roth, Nancy L.</b>	Retired
<b>Russell, Susan H.</b>	Rector, St. Andrew's, Marblehead, MA
<b>Sammons, Gregory P.</b>	Co-Rector, St. Michael's-in-the-Hills, Toledo
<b>Sammons, Margaret Holt</b>	Co-Rector, St. Michael's-in-the-Hills, Toledo
<b>Schoonmaker, Daniel H.</b>	Rector, St. Hubert's, Kirtland Hills
<b>Schutz, Christine E.</b>	Rector, Trinity, Findlay
<b>Sedgwick, R. Stephen</b>	Rector, Redeemer, Lorain
<b>Selnick, T. Conrad</b>	Rector, St. Christopher's-by-the-River, Gates Mills
<b>Sipes, David S.</b>	Retired, Extended Supply, St. Mark's, Shelby
<b>Sloan, Carey E., III, AOJN</b>	Retired
<b>Smercina, Eugene E.</b>	Retired; Extended Supply, St. Paul's, Bellevue
<b>Smith, M. Elden</b>	Retired
<b>Snyder, William D.</b>	Deacon, Grace, Ravenna
<b>Stevens, Karl</b>	Priest-in-Charge, St. Paul's, Mt. Vernon; Chaplain, Kenyon College
<b>Sunderland, Melanie</b>	Chaplain, Cancer and Palliative Care, Cleveland Clinic
<b>Suntken, Brian S.</b>	Rector, Christ Church, Hudson
<b>Svoboda-Barber, Helen C.</b>	Rector, Harcourt Parish, Gambier
<b>Tarsis, George M.</b>	Rector, St. Andrew's, Barberton
<b>Thomas, Howard F.</b>	Retired
<b>Thomas, John P.</b>	Retired; Associate, St. Paul's, Mt. Lebanon, PA
<b>Tompkin, William F.</b>	Deacon, Retired
<b>Townsend, Jerrald L.</b>	Retired
<b>Trumble, John L., Jr.</b>	
<b>Walcott, Robert</b>	Retired
<b>Weaver, Robert C.</b>	Retired
<b>Wigle, John W.</b>	Retired
<b>Wilbert, Brian K.</b>	Rector, Christ Church, Oberlin
<b>Williams, Arthur B., Jr.</b>	Bishop Suffragan, Diocese of Ohio, retired; Assisting Bishop, Diocese of Ohio
<b>Williamson, Jeremiah</b>	Rector, St. Andrew's, Toledo
<b>Wright, Catherine</b>	Rector, St. Andrew's, Elyria

## Lay Delegates Present

### **Akron, Church of Our Saviour**

Bryson, John  
Schwan, Anne  
Tubaugh, Tom

### **Akron, St. Andrew's Church**

Bennett, Hugh  
Schlauch, James  
Yocum, Becky

### **Akron, St. Paul's Church**

Freeman, Jane R.  
Goodall, Sally  
Rosenberg, Todd

### **Akron, St. Philip's Church**

Caywood, Denise C.  
Miller, Lynnette  
Smith, Harriet

### **Alliance, Trinity Church**

Hougham, Pam  
Rickard, Patricia

### **Ashland, St. Matthew's Church**

Jones, Dana J.  
Mambourg, Kathy

### **Ashtabula, St. Peter's Church**

Hazeltine, Sara

### **Barberton, St. Andrew's Church**

Baker, Louise  
Baker, Paul  
Demko, Maxanna

### **Bellefontaine, Church of the Holy Trinity**

Heffner, Cynthia L.  
Vance, Catherine Ruth  
Wappelhorst, Carol

### **Bellevue, St. Paul's Church**

Meadows, LeRose

### **Berea, St. Thomas Episcopal Church**

Amos, Alice  
Miller, Sonia  
Sewell, Marian

### **Boardman, St. James' Church**

Downey, Jeffrey  
Hosler, Roderick  
Van Devender, Paul

### **Bowling Green, St. John the Baptist's Church**

Patton, Patricia

### **Brecksville, St. Matthew's Church**

Kirsch, Ira  
Rieman, Dottie

### **Brunswick, St. Patrick's Church**

Catanese, Charles  
Close, Gary  
Dunsmoor, Forrest

### **Canton, St. Mark's Church**

Green, John  
Keenan, Anthony  
Walton, Scott

### **Canton, St. Paul's Church**

Sutek, Carol J.  
Swope, David  
Wogaman, Michele

### **Chagrin Falls, St. Martin's Church**

Backs, John  
Boehringer, Thomas  
Meade, John

### **Chardon, St. Luke's Church**

Dolan, Doug  
Gregory, John

**Cleveland Heights,  
St. Alban's Church**

Brumm, June  
Martin, Margaret  
Webster, Mark

**Cleveland Heights,  
St. Paul's Church**

Buss, William  
Chance, Christina Sibilla  
Ptacek, Katy

**Cleveland, St. Andrew's**

Arrington, Darcel  
Greene, Giesele  
Porter, Andrea

**Cleveland, St. Luke's Church**

Dunn, Jon  
Gatlin, Lonny  
Gracey, R. Stephen

**Cleveland, St. Mark's Church**

Burns, Kenneth  
Gabel, Kathleen M.  
Morin, Gary

**Cleveland, Trinity Cathedral**

Redmond, Sandra  
Turk, Linda  
Wallner, Corinne

**Coshocton, Trinity Church**

Abood, Michael  
Roahrig, Dorcas  
Smith-Comley, Laurel

**Cuyahoga Falls,  
St. John's Church**

Carmichael, Michael  
Henry, Val  
Hopton, Thomas

**Defiance, Grace Church**

Saneda, Cathy  
Shaffer, Richard  
Yaross, Julie

**East Liverpool,  
St. Stephen's Church**

Reiner, Ruth Ann  
Vodrey, Sarah

**Elyria, St. Andrew's Church**

Pressnell, Gary  
Skladan, Doug  
Skladan, Ruth

**Euclid, Church of the Epiphany**

Ballinger, Kristi  
Pipkin, Angela  
Pipkin, Harry

**Findlay, Trinity Church**

McCoy, Beverly  
Roberts, Richard  
Robeson, Lisa G.

**Fremont, St. Paul's Church**

Borer, Melissa  
Hasselbach, Christine  
Speer, Carolyn

**Gambier, Harcourt Parish**

Bennett, Robert  
Givens, Susan  
Toth, Robert

**Gates Mills, St. Christopher's  
by the River Church**

Batcheller, Peter  
Irwin, John

**Geneva, Christ Church**

Bancroft, Kim  
Cozad, Mary

**Hudson, Christ Church**

Edwards, J. William  
Green, R. Thomas  
Madison, Robert H.

**Huron, Christ Church**

Cameron, Carolyn Sue  
Hakeman, Chris-Anne  
Lewis, James

**Kent, Christ Church**

Gagich, Gloria  
Goldthwaite, Elizabeth  
Kordinak, Paulette

**Kirtland Hills,  
St. Hubert's Church**

Bing, Jenna  
Knapp, Donna  
McConnell, Ann

**Lakewood, Church of  
the Ascension**

Culp, Carol Ann  
MacIntosh, Donald  
Peterson, Jon

**Lakewood, St. Peter's Church**

Bickerton, Michael  
Horning, Gerald  
Uible, Christina

**Lorain, Church of  
the Redeemer**

Ingram, Betsy  
Prokop, Dawn  
Siss, George

**Lyndhurst, Church of  
the Good Shepherd**

Nicol, Amanda  
Vielhaber, Marta  
West, John

**Macedonia,  
St. Timothy's Church**

Letsky, Maureen  
McDonald, Cheryl  
Spearing, Judith

**Mansfield, Grace Church**

Baker, James  
Davis, Karen  
Hubbard, David

**Marion, St. Paul's Church**

Klages, Bonnie  
Tornes, Vicky

**Maumee, St. Paul's Church**

Foster, Margaret  
Tallon, Natalie  
Volkmer, Richard

**Mayfield Village,  
St. Bartholomew's Church**

Buckley, Jo Ann  
Cory, Bruce  
Keay, Charles

**Medina, St. Paul's Church**

Hansen, Mark  
Berno, Jeffrey  
Kelly, Kim

**Mentor, St. Andrew Episcopal  
Church**

Pattison, Robert  
Sopko, Barbara  
Sundstrom, Douglas R.

**Mount Vernon, St. Paul's Church**

Dingler, Tedrow  
Laudeman, Sam  
Thomson, Connie

**Napoleon, St. John the  
Evangelist's Church**

Sonick, Jill C.  
Strayer, Jeffrey

**New Philadelphia,  
Trinity Church**

Ream, Harry Jack  
Rusznak, Joseph  
Smith, Barbara Ann

**Niles, St. Luke's Church**

Bauman, Patricia A.  
Bissell, Barbara  
Wiencek, William

**Norwalk, St. Paul's Church**

Downing, Catharine  
Gerken, James  
Mellott, Elaine

**Oberlin, Christ Church**

Brittingham, Midge  
Harrison, DeSales

**Painesville, St. James Church**

Knapp, Darrell  
Morton, Gracia  
Nielsen, Laura

**Parma, All Saints Church**

Harrivel, Amy  
Kynerd, Sandy  
Talbot-Miller, Debbie

**Perrysburg,  
St. Timothy's Church**

Bearss, John  
Bearss, Julia  
Rieck, Stephanie

**Port Clinton,  
St. Thomas' Church**

Butcher, Anne  
Hartlaub, Shirley  
Roth, Joy

**Put-in-Bay, St. Paul's Church**

Blumensaadt, Dana  
Meyers, Mary Ann  
Toms, Doraine



**Ravenna, Grace Church**

Lundgren, Fred  
Lundgren, Nancy  
O'Keefe, Roberta

**Salem, Church of Our Saviour**

Byler, Joseph  
Byler, Patricia  
Rowe, Connie

**Sandusky, Grace Church**

Frost, Phillip

**Shaker Heights, Christ Church**

Goward, David  
Griffith, Charles  
Ong-Landini, Katie

**Shelby, St. Mark's Church**

Traven, Dale

**Sidney, St. Mark's Church**

Devers, Glenn  
Leigh, Clara

**Steubenville,  
St. Stephen's Church**

Morris, Ruth C.

**Toledo, All Saints Church**

Roberts, Charles  
Scott-Hayward, Victoria

**Toledo, St. Andrew's Church**

Fisher, Andrew  
Keener, Mary  
Saccoccia, Mike

**Toledo, St. Mark's Church**

Beroske, Mary  
Hamilton, Jane  
Morris, Bob

**Toledo, St. Matthew's Church**

Hooper, Barbara  
Hooper, Brandon

**Toledo,  
St. Michael's-in-the-Hills**

Jewell, Michael  
Yocum, Rick

**Toledo, Trinity Church**

Crawford, Darl  
Roth, Rebecca  
Zechman, James

**Uniontown, New Life  
Episcopal Church**

Miller, William  
Sisak, Brian  
Szwast, Janet

**Wadsworth, St. Mark's Church**

Hawkins, Diane  
Kennedy, Kathy  
Kennedy, Robert

**Warren, Christ Church**

Day, Linda  
Schweitzer, Janet  
Seaver, Joan

**Westlake, Advent  
Episcopal Church**

Busony, Raymond  
Foster, Jeffrey  
Moore, Donald

**Willoughby, Grace Church**

Estep, Elizabeth  
Zimmerman, Debra

**Wooster, St. James Church**

Brooks, Ned K.  
Hickey, Damon  
Smart, Celia C.

**Youngstown, St. John's Church**

Faires, Barbara  
Maiden, Phillip  
Witt, James

# **Appendix I**

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## **The Episcopal Address and the Bishop's Papers**

## **The 2009 Episcopal Address**

**Bishop's Address  
193<sup>rd</sup> Diocesan Convention  
November 14, 2009  
Trinity Cathedral**

Two weeks ago yesterday, Bishop and Mrs. Bowman, Bishop Williams, Bishop Grew, and I gathered in Marquette, Michigan, with Martha Burt, her four daughters, and their families, to bury John Harris Burt, the Eighth Bishop of Ohio. It was both a sad and joyous celebration of a long life sacrificially lived, a life committed to equality and justice and the betterment of others, a life generously given to God in service to God's beloved. Some of you have written or spoken to me of your connection to John as the bishop who confirmed you or ordained you or made an important contribution to your formation as a Christian. Today I want to gather together in our prayer all of our remembrances and gratitude and offer this Convention Eucharist in thanksgiving to God for the life and ministry of John Burt. To that end I also ask that the offertory gifts from this service be given to High Rocks, a year-round ministry to adolescent girls in West Virginia, founded by Bishop Burt's daughter, Susan, and currently directed by his granddaughter, Sarah. I urge you to be generous in your giving.

Bishop Williams, in his funeral homily, quoted from Bishop Burt's 1977 Convention Address, ten years into his episcopacy. It was a time not unlike our own. You will remember that the United States had faced a serious energy crisis resulting from the OPEC oil embargo levied against this country in response to our rebuilding of the Israeli military. We had suffered a concurrent stock market crash. As the Church looked towards the 80s and a new decade, Bishop Burt urged the Diocese of Ohio to spend the coming three years discerning what kind of church it needed to be to meet what seemed an uncertain future. The concluding words of that address challenged the congregations and communicants of the Diocese to give themselves on behalf of others in this way:

***When people see a church that is more concerned for its "fabric" than for its "mission"; a church that is more fearful of "making mistakes" than "making an effort"; a church that is more willing to "rusticate" than to "dedicate"; more willing to "risk its money" than to "risk its life"; – then you have a noncontroversial, nonirritating, doughy ecclesiastical residue, incapable of communicating the mighty Gospel of her Lord – and content to be an anesthetic to the "best impulses" of questing men.***

***Let it never be said that we in Ohio have settled for that kind of Church.***

There is no question that Bishop Burt's legacy is borne out in the many dedicated, controversial, irritating, life risking (read status quo risking) ministries of blessing, justice, and care currently being carried out by the congregations and communicants of the Diocese of Ohio and The Episcopal Church. It is borne out in successful mission efforts, both at home and abroad, and perhaps equally has been manifested in those that have failed. John Burt's conviction about churches being willing to risk their lives, not just their money, points to a church that is willing to make mistakes, even fail, as it moves from the status quo to the new life in Christ. It is witnessed, for instance, at St. James Church, Boardman as it celebrates this year its bicentennial, marking two centuries of willingness to risk what *is* in order to become what *is not yet*.

I would argue that the same conviction is borne out by the parishioners of churches like Grace Church, Galion, Trinity Church, Bryan, and St. Andrew's Church, Canfield who have quite literally given their parochial lives, choosing to close as parishes of this Diocese, to cease spending their energies and God's resources in the pursuit of a vitality that was not forthcoming, and giving themselves to the possibility that God may have something new to offer them as Christians, both in terms of venue and ministry.

John Burt's hope for the Diocese of Ohio is manifested at parishes like St. Paul's, Marion, and Christ Church, Shaker Heights, at St. Paul's, Ashtabula, and St. Mark's, Toledo, at Grace Church, Mansfield, and Christ Church, Warren, and in every Episcopal Church food pantry and soup kitchen where people are given the daily bread for which Jesus taught us to pray. It is manifested in Trinity Church, New Philadelphia, St. Paul's, Mt. Vernon, and every parish building where homeless people are being given shelter from the elements and a safe place to sleep. It is manifested at St. Luke's, Cleveland, and St. Paul's, Cleveland Heights, and in each of our church buildings where neighborhood children are given educational support and encouragement in afterschool programs. It is manifested in these shirts given off our backs, thousands of T-shirts collected today from all across the diocese, so many that the Cathedral staff is having to move them into the basement to make room for our convention activities. And it is manifested whenever Episcopalians in this diocese stand up for the rights and needs of the disabused, discounted, disaffected, and oppressed. It is manifested every time the people of this diocese give **themselves** to God that God might use them in God's mission.

Yesterday more than one hundred fifty of us, representing fifty congregations, gathered here at Trinity Commons to give ourselves to God in the service of others at a number of sites around this city. Thanks to the Canon for Mission Mark Robinson's planning and guidance, together we were the hands of Christ ministering to God's beloved. It was an inspiring act of giving, after which some two hundred of us shared a simple meal here at Trinity Commons and reflected with one another in small table groups about how such self-giving changes us, how God transforms us when we give who we are and what we have back to God, from whom each and all have come, and how that giving informs our sense of purpose and forms our relationship to God in Christ. That is the kind of giving that builds the church to which Bishop Burt challenged this diocese thirty years ago.

Sacrificial giving, the spiritual surrender of self to God that we proclaim in our diocesan mission statement, is a comprehensive act. It is carried out in our service of others, in our financial giving to parish and diocese, in our participation in the life of the church, in our leadership as Christians in the world, and in our prayer. It is this last, giving ourselves to prayer, that I want to focus on this morning. As we gather in this convention Eucharist, giving thanks for the life of John Burt, we do so on the feast day of another noteworthy bishop, the first Bishop of Connecticut and first bishop of the Episcopal Church in the United States of America, Samuel Seabury. It seems particularly appropriate that the gospel lesson appointed for this day recounts Jesus' directing the disciples about how to give themselves in response to the great needs of the world. "The harvest is plentiful, but the laborers are few; therefore ask the Lord of the harvest to send out laborers into his harvest." (Matthew 9:38) In this story, the first act of giving ourselves to God is **prayer**. "Ask the Lord." My image of this scene is that Jesus expected the disciples to do just that. To pray, right then and there, together. With each other.

Not to wait for him to pray on their behalf, nor to go home and kneel alone in prayer, but to launch right in together, in that very moment. Jesus knew, doubtless from his own prayer discipline, that asking God to send out laborers would itself transform the disciples' own labor.

There is some evidence that this didn't come easily to the disciples. Prayer doesn't appear to have been the default response to the considerable challenges of their lives and ministries. Remember how they reacted to the hunger of the multitudes and the storm at sea. It was not with prayer. Remember how in Luke's gospel, after they had seen Jesus praying, one of the disciples asked him, "Lord, teach **us** to pray." And remember how in the Sermon on the Mount Jesus instructed them, "Pray then in this way: **Our** Father..." (Matthew 6:9) Pay attention to the pronouns. It is significant that the prayer Jesus taught the disciples uses only plural pronouns – give **us** this day **our** daily bread, forgive **us our** trespasses, as we etc. He taught them to pray **together**. "Again, truly I tell you, if two of you agree on earth about anything that you ask, it will be done for you by my Father in heaven. For where two or more are gathered together in my name, I am there among them." (Matthew 18:19-20)

There is similar evidence that this sort of prayer doesn't come that easily to all Episcopalians. We pray in church, or go along with what is being prayed on our behalf, and we "say our prayers" privately, with varying degrees of discipline. But I observe that many of us struggle to pray with one another for the everyday concerns and needs of our and each other's lives, and for the things we either fear or yearn for in our own lives, in our faith, and in our congregations. Twenty years ago a colleague and I started a monthly Saturday morning men's group in the parish where I served as rector. We had a dozen or more faithful participants, guys whom I had watched white knuckling it through church on the average Sunday, who rarely said aloud the word "God" unless it was followed by "damn it." Some months into our meetings, one of them became ill and was hospitalized. When he recovered, he reported to the group at our monthly meeting how calm he had been in the hospital, and how he had felt our prayers for him. A few minutes later, another member of the group offered thanks for our companion's recovery, and quite awkwardly confessed that he, in fact, had not been praying for him. I noticed that somewhat self-consciously heads were nodding all around the circle. It was in fact a general confession. The man who had been ill was not hurt by this; the comfort and confidence he felt in the hospital had been genuine and the bond of companionship among the group was strong. But together they began to face in a new way both their limited experience with prayer and their common reticence to give themselves to it.

Their confession reminded me of Annie Dillard's description in Teaching a Stone to Talk of the Christians' general lack of consciousness about and confidence in the power that Jesus said can bind and loose on earth and in heaven. She writes:

*On the whole, I do not find Christians, outside of the catacombs, sufficiently sensible of conditions. Does anyone have the foggiest idea what sort of power we so blithely invoke? Or, as I suspect, does no one believe a word of it? The churches are children playing on the floor with their chemistry sets, mixing up a batch of TNT to kill a Sunday morning. It is madness to wear ladies' straw hats and velvet hats to church; we should all be wearing crash helmets. Ushers should issue life preservers and signal flares; they should lash us to our pews. For the sleeping god may wake someday and take offense, or the waking god may draw us out to where we can never return.*

Crash helmets, life preservers, and signal flares. Being drawn out by the “waking god” to where we can never return. That is the church I want to serve. A church that gives itself to the power of God’s love in ways that change everyone it touches – the members, the community, the beloved of God it serves, the world. And I am persuaded continually that it begins with our giving ourselves to God in prayer. “Ask,” instructs Jesus. “Get together and ask together.”

Last Sunday my visitation was to the Church of the Redeemer in Lorain. As some of you know, the rector, Steve Sedgwick, is leaving there to serve as Interim at the Church of the Good Shepherd in Lyndhurst. Tomorrow is his last Sunday. The congregation, not unlike the city it serves, has suffered financially and is unable to afford full-time clergy presence. I confirmed five high-school students who are deeply committed to their church and showed remarkable spiritual maturity for their ages.

In my sermon I told the congregation that the two things I hear week after week from communicants and vestries in the parishes I visit is that they need more people and more money. This sounds familiar, doesn’t it? Yet never, not once, have I heard people praying explicitly for those things during the intercessions. After the prayers for the candidates last Sunday, during the silence for which the rubric asks before the concluding collect, I invited the congregation to pray aloud to God for those things they know they need moving forward. There were prayers of thanksgiving for family and friends and for the parish and the rector. Prayers of gratitude. Important prayers to pray, but not the ones that put us or God much on the spot. And then Evan, one of the teenaged confirmands, prayed that they would be bold in inviting other people to come to their church. That did it. The cat was out of the bag, the lid was off the worm can, and the conversation with God shifted. Then a man, perhaps the oldest in the congregation, someone I learned later seldom says much at all, prayed in a steady voice for new members and new ministries and new direction for this parish in which he had spent his whole life. It was a powerful moment. Not quite crash helmet time, but surely on the way toward it.

Now, I recognize that a few prayers on a bishop’s visitation are alone unlikely to change the life of a parish, but I am certain that a sustained life of praying together will. Jesus tells us so. “Ask the Lord of the harvest to send out laborers into his harvest.” “Ask.”

This morning I want us to do just that. You and I are God’s elect and the Diocese of Ohio’s elected leaders, and Jesus has repeatedly instructed us to pray. This seems a good place to start. So this morning, and throughout the convention, I want us, the elect and the elected, to pray together and to ask God for the things that we think we need to have, the things we suspect we need to do, and the church we believe we need to be. I want us to ask God what God wants us to have, what God wants us to do, and what God wants us to be, and then ask God to help us strive for those things. I want us to pray for one another, for those who share in ministry with us, and for those who do not yet know God in Jesus Christ. And I want us to pray in a way that will have us scrambling for crash helmets and life preservers!



In order to do this, I ask you now to pair up with a person next to you. That means in twos, the way the apostles were sent out. If you end up solo, find another solo close by. If there is no other option, you may make a threesome, but a pair is best. If you do not know each other, introduce yourselves. Now, each of you take thirty seconds or so and pray aloud for this convention, first one of you, and then the other. I know that for some of you this may feel awkward, but I'm only talking about a total of one minute. I'll tell you when thirty seconds is up and you ought to switch. When your partner is praying, don't just listen, pray along with your heart. Ask God to hold us together in God's love and to bring us to wise decisions. Ask God to lead us to the things that God wants for us. Ask God to direct the ways we speak with and listen to each other. Ask God to surface among us the ways we most need to give ourselves to God and to the world, as God's church. Pray for each other, pray for this day. Ask God whatever comes into your heart for this convention. Go ahead and pray.

**(Prayer time)**

We have worthy challenges ahead of us as a Church and as a Diocese, and a few of those I want to mention at this time. Having met in General Convention this summer, The Episcopal Church has undertaken an administrative restructuring and reallocation of resources resulting from a considerable budget reduction for the upcoming triennium. The practical effect on the Diocese of Ohio will be a slight reduction in what we are asked to give to The Episcopal Church in 2011 and 2012, and a number of changes in the resources offered us from the Church Center staff.

The General Convention also articulated its continuing and unfailing commitment to be a full participant in the Anglican Communion, recognizing that that means participating as the comprehensive and complex body that God has called us to be, leaving out no one whom God has invited in. Resolution D025, entitled **Commitment and Witness to [the] Anglican Communion**, affirms our participation in the Communion and our fidelity to this Church's legislative and ecclesial history of lay and ordained leadership being open to the all the baptized.

Resolution C056, entitled **Liturgies for Blessings**, calls on the Church to gather theological and liturgical resources to help explore how we might serve and support the growing numbers of partnered same-sex couples in our congregations and communities. To meet that call I will appoint a task force to gather such resources from our congregations, clergy, and communicants, in order that the Diocese of Ohio might play a constructive and leadership role in the larger Church's carrying out of this endeavor. So now, I ask you and your prayer partner each in turn to pray aloud for The Episcopal Church and its leadership, for our commitment and witness to the Anglican Communion, and for fidelity to our vocation to serve and be served by all of God's beloved. Ask God to lead us into new ways that offer the world models of living together with difference. Ask God to bring our church growth in mission and lead us into all truth.

**(Prayer time)**

As was announced this week, the Diocesan Council and the Vestry of Trinity Cathedral have come to the difficult decision that the bookstore here at Trinity Commons is no longer able to be afforded. The economy, the construction and consequent traffic changes to Euclid Avenue, and the cost benefits and convenience of Internet book buying have conspired to make independent bookselling unsustainable.

This is a loss to the ministry of the Diocese and Trinity Commons, and especially to those who have found it to be a practical and spiritual resource of great value. There have been only a couple of years in which the bookstore has been able to break even, and that is with the unaccounted annual support of rent-free space and bookkeeping services totaling some \$40,000. In addition, the cash deficits covered with diocesan funds have run from \$10,000 to \$40,000 annually. And yet, it is very difficult for many of us to let it go. For everything that it has provided us since it's opening, we are all indebted to those whose tireless efforts have sustained it for this decade, especially Katherine Pinard, and May Targett, Jim Bolce, Marilyn Taylor, Michael Lawrence, and Nan Hunter, among numerous others.

I want to say a particular word about Katherine. As founder, manager, volunteer, and patron saint of Sacred Path Books and Art, she has modeled for all of us the passionate commitment and personal sacrifice that lie at the center of our vocation to be Christian. For countless visitors to the bookstore, she has been the hands and heart of Christ, providing not only books, but the care and encouragement they sought. For her ministry on behalf of this Diocese, it is my privilege to award her the Bishop's Medal.

In the next year we will come to the point of having to make clear decisions about Cedar Hills and its ongoing role in camp and conference center ministry. This year's diocesan budget reflects a \$30,000 reduction in the line item support for Cedar Hills, and Pete Nielsen has again done an exceptional job in adjusting the program and hospitality offerings to accommodate this funding change. The reality is that Cedar Hills provides valuable space and ministry, but to an ever decreasing number of our own congregations and communicants. It is not a property that can simply be closed up and left alone for months at a time. At the same time, it may not be something the Diocese can continue to subsidize for the decreasing use of our own parishes and the increasing use of other institutions. Last summer I appointed a Task Force, chaired by Chet Bolling of St. Paul's Church, Norwalk, to research and imagine the needs and possibilities for Camp and Conference Center ministry in this Diocese, looking at the range of such ministries across the Church and the types of facilities used to accomplish them. When their work is completed next spring, the Diocesan Council will be in a better position to assess the future of both Camp and Conference Center ministry in the Diocese of Ohio, and Cedar Hills. Now, I ask you to pray aloud with one another, sharing a minute as before, and ask God to support Pete and the ongoing ministry of Cedar Hills, and to support Chet and the Camp and Conference Ministry Task Force in their work. Pray for those who serve and are served by the programs and hospitality of Cedar Hills. Ask God what God is dreaming of for us and for that place.

***(Prayer time)***

Last month, Brad Purdom, who with Vincent Black leads the Office of Congregations and Christian Formation, presented the Diocesan Council with some informative data on Average Sunday Attendance in this Diocese and parishes' perception of their own vitality. The Average Sunday Attendance data is not perfect as it depends on annual parochial reports that have lapses in reporting, but the numbers reflect what you might imagine. In the last decade, about a quarter of our congregations have grown in average Sunday attendance and three quarters have decreased. Since 1999, the total diocesan average Sunday attendance has dropped by about one third. While this is in keeping with many mainline churches over the same period of time, it reflects the hesitance and even reluctance to invite, share, and evangelize that seems to be in our DNA as Episcopalians.

The other data Brad has provided reflects how congregational leaders assess the vitality of their parish, and it is markedly positive. The majority report an increase in energy and ministry involvement, with a shared sense of hope for the future. Of that majority, a large number have engaged in the Natural Church Development process, about which you heard an extensive description at both last year's Convention and Winter Gathering. There is emerging evidence that the shrinking of some of our congregations has resulted in their communicants taking a focused look at who they are and making intentional efforts to explore their strengths and weaknesses as communities of faith. That exploration has led them to live in ways that open them to others and to the possibilities of vitality that God wants for their congregation.

I mention these two reports because I think they give us a realistic glimpse of who we are as a Diocese and a Church. We continue to be getting smaller, in part because some leave, and in much larger part because we are not actively sharing with others what we treasure in our relationship with God and Jesus. At the same time, there is a spirit of adventure and vitality in many of our congregations, a spirit that needs to be nurtured and developed, a spirit that wants to grow. Jesus tells us that prayer is an essential characteristic of that spirit. And so I ask you once again to spend a moment praying aloud with your partner, this time asking along with Evan for boldness in inviting others into our relationship with Jesus and our life as Christians. Ask God what God wants us to offer to those we know and those we don't know yet. Ask God for the right words of invitation and the opportunities to use them. Ask God to open our eyes, ears, and hearts to what others are seeking and to give us confidence that we can be their companions in that journey.

**(Prayer time)**

In the last few weeks, Brad has also given to each actively serving clergyperson and each congregation without a priest a copy of the book, *Unbinding the Gospel*. It is the work of Martha Grace Reese, formerly a Disciples of Christ pastor and then director of a Lilly Endowment project in congregational revitalization through spiritual leadership. Her book is the result of a four-year study of evangelism in mainline denominations. In it, she gives great insight into the challenges and obstacles to growth that we face, and it offers remarkable encouragement and direction to those Christians in mainline congregations who want to give themselves to sharing with others their relationship with Jesus and their faith in God. It is both a detailed account of what she has learned through her research of hundreds of mainline congregations and a step-by-step how-to book for engaging ourselves in spreading the gospel in ways authentic to each of us, beginning by giving ourselves to a discipline of prayer. I and the program staff are in our sixth week of her process, and we are finding it a great benefit to our personal prayer disciplines and to our work together. Brad has set up conference calls with the author and her colleagues for those who are doing the same in their congregations, to receive coaching and advice from the source. We have scheduled Martha Grace Reese to be our keynote presenter at the Winter Convocation on February 5<sup>th</sup> and 6<sup>th</sup>.

Some of you may have already begun to explore this rich resource, and I invite the rest of you to pursue with your vestries and fellow parishioners whether Unbinding the Gospel is a program for you. For those parishes whose NCD work has discovered a deficit in Passionate Spirituality or Need-oriented Evangelism, it may be a particularly timely resource. It can begin with just a small group of participants. Brad's office will give you the books and the assistance you need to get going, and any experience of the program will add to our Convocation in February. I commend it to you whole-heartedly.

To be a church that lives boldly, we must be a church that prays boldly. If we are going to live life with God leading, if we are going to be a church that follows Jesus, we need to talk with and listen to God in Christ together. That is the church into which Jesus has called each of us from its beginning, a community that prays for and with one another, that seeks Jesus' direction and encouragement, that allows the Holy Spirit to set our course through whatever winds and waters we face.

The lofty calling of Samuel Seabury's ministry was, as the collect for his feast day recounts, the renewal of the Anglican inheritance in North America. It was the establishing anew of this Church in the emerging culture and society of a new nation. John Burt understood that same call to renewal three decades ago, and urged this Diocese to be a church that communicates the "mighty Gospel" of Jesus. As you and I approach now the second decade of this millennium, I pray that we will answer the same call to renewal as Christians and the recipients of our Anglican inheritance in this day. I pray that beginning by giving ourselves to God in a renewed and renewing life of prayer, in the bold kind of prayer that Jesus required of the first disciples and requires of us, we might come to tell all people of God's love for them and share with them the new life we find in Christ.

In joyful and confident anticipation that, with God's help, we will grow into that generous evangelism that is symptomatic of a vital and vibrant church, I have a present for each of you. It is not another wristband whose message is known only to the wearer. It's a little more exposed, and exposing. Its use will mark our willingness to share with others why we are Christian and what God means to us. It will signal that we are ready to offer God's invitation to anyone and everyone to learn how they are loved and valued beyond their imagining. It will witness to a courageous faith and a humble confidence in God, that together make us tireless doers of justice and advocates for God's beloved everywhere. It may even signal that we need to start looking for a few crash helmets.

The gift is this bumper sticker, which reads: ***I am Episcopalian. Ask me about God.***

Put it wherever those whom God is yearning to be close to will see it, and let them know you have an answer. That answer is to show them your life in Christ.

Amen.

**Episcopal Acts**  
November 14,  
**2008** – November  
12, **2009**

<b>Annual Visitations</b>	<b>Confirmed</b>	<b>Received</b>
Bishop Mark Hollingsworth, Jr.	69	14
Bishop David C. Bowman	9	7
Bishop William D. Persell	5	7
Bishop Arthur B. Williams, Jr.	34	18
<b>Episcopal Inquiries</b>		22
<b>Institutions</b>		4
<b>Licensed</b>		
Catechists		25
Eucharistic Ministers		794
Eucharistic Visitors		299
Worship Leaders		275
<b>Ordinations</b>	<b>Diaconate</b>	<b>Priesthood</b>
Bishop Edward L. Lee, Jr. <i>on behalf</i> <i>of Bishop Mark Hollingsworth, Jr.</i>		1
Bishop Mark Hollingsworth, Jr.	5	
<b>Receptions</b>	<b>Diaconate</b>	<b>Priesthood</b>
Daniel J. Knaup, Jr.		1

## Ordination Report

	<b>Date of Postulancy</b>	<b>Date of Candidacy</b>
Audra Abt	March 14, 2007	April 8, 2009
George R. Baum	March 30, 2005	April 14, 2008
Vincent E. Black	February 28, 2006	April 14, 2008
Joseph G. Butler	April 5, 2007	
Christopher A. Coughlin	March 14, 2007	November 9, 2009
Andrea L. Dedmon	May 6, 2005	April 8, 2009
E. Marie Harkey	March 7, 2006	April 8, 2009 (Suspended July 2009)
Gianetta M. Hayes-Martin	March 14, 2007	April 8, 2009
R. Matthew Humm	March 30, 2005	April 8, 2009
Jennifer C. Leider	March 30, 2005	April 14, 2008
Adam McCluskey	March 14, 2007	
David S. Nelson	November 5, 2008	April 8, 2009
Lisa E. O'Rear-Lassen	March 14, 2007	
Michael Petrochuk	March 28, 2007	
Anne Pillot	April 5, 2007	
Jane Trager	April 5, 2007	
Judith B. Watson	June 25, 2007	(Withdrew)

### Ordinations to the Diaconate

George R. Baum	June 13, 2009	Mark Hollingsworth, Jr., Trinity Cathedral, Cleveland
Vincent E. Black	June 13, 2009	Mark Hollingsworth, Jr., Trinity Cathedral, Cleveland
R. Matthew Humm	June 13, 2009	Mark Hollingsworth, Jr., Trinity Cathedral, Cleveland
Jennifer C. Leider	June 13, 2009	Mark Hollingsworth, Jr., Trinity Cathedral, Cleveland
David S. Nelson	June 13, 2009	Mark Hollingsworth, Jr., Trinity Cathedral, Cleveland

### Ordinations to the Priesthood

Diana E. Carroll	January 10, 2009	Mark Hollingsworth, Jr., Trinity Cathedral, Cleveland
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### Receptions to the Priesthood

Daniel J. Knaup, Jr.	June 13, 2009
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Edward L. Lee, Jr. on behalf of Mark  
Hollingsworth, Jr., Philadelphia Cathedral,  
Philadelphia, PA

Mark Hollingsworth, Jr., Trinity Cathedral,  
Cleveland

## **Letters Dimissory**

### ***Letters Dimissory Received***

November 14, 2008 – November 12, 2009

<b><i>Date</i></b>	<b><i>Name</i></b>	<b><i>Diocese</i></b>
June 23, 2009	Catherine L. Wright	Chicago
June 29, 2009	Vanessa E. B. Clark	Southern Ohio
October 9, 2009	Thomas Hawkins	Michigan
November 2, 2009	Himie Budu Shannon	North Carolina
November 2, 2009	Mark K. J. Robinson	Connecticut
November 10, 2009	Heather Hill	Pennsylvania

### ***Letters Dimissory Sent***

November 14, 2008 – November 12, 2009

<b><i>Date</i></b>	<b><i>Name</i></b>	<b><i>Diocese</i></b>
November 24, 2008	John M. Atkins	Pennsylvania
January 14, 2009	Kurt C. Wiesner	New Hampshire
January 14, 2009	Elizabeth A. Scriven	Michigan
May 19, 2009	Doyt L. Conn, Jr.	Olympia
August 3, 2009	Julian Eibin	Newark
September 24, 2009	Marcus T. Cunningham	Kansas
September 30, 2009	Gretchen K. Weller	Western Michigan



## The **Necrology**

*The Bishop bids your special prayers of thanksgiving during the Liturgy of the Holy Eucharist at the 193<sup>rd</sup> Convention of the Diocese of Ohio for the lives of the following servants of Christ who entered the Church Triumphant since last we met.*

*From among the bishops:*

The Rt. Rev. John Harris Burt, retired 8<sup>th</sup> Bishop of Ohio  
The Rt. Rev. John B. Coburn, retired Bishop of Massachusetts  
The Rt. Rev. Robert Hatch, retired Bishop of Western Massachusetts  
The Rt. Rev. Robert O. Miller, retired Bishop of Alabama  
The Rt. Rev. Geoffrey Parke-Taylor, retired Bishop of Huron and Toronto  
The Rt. Rev. Francisco Reus-Froylán, retired Bishop of Puerto Rico  
The Rt. Rev. C. Charles Vaché, retired Bishop of Southern Virginia  
The Rt. Rev. James D. Warner, retired Bishop of Nebraska

*From among our clergy:*

The Rev. Albert W. Anderson  
The Rev. William G. Knapp  
The Rev. Herbert G. Myers  
The Rev. William H. Olsen  
The Rev. Roderic H. Pierce  
The Rev. Terry W. Russell  
The Rev. John W. Simons  
The Rev. Thomas E. Vossler

*From among the clergy family:*

George M. Tarsis, Jr., son of the Rev. George Tarsis

*From among the ranks of the laity:*

**Our Saviour, Akron**

Mildred Boehm, Russell Pembroke, Sheila Williams

**St. Andrew's, Akron**

Hei Say Paw, Lois Robinson

**St. Paul's, Akron**

Mary Avedisian, Norma Boyle, Todd Burns, Patricia Chiles,  
Robert Clark, Eunice Cole, Shirley Croft, Terence Deane,  
Charles Fox, Dorothy Frendberg, Donald Holloway, Sue Hoyt,  
Dorothy Kehrle, William Lambert, Joseph Morris, Donald Nelson, Grace  
Parker, James Peters, Ann Reed, Julia Richards,  
Edward Sawyer, Marian Scovell, Juanita Shelhart, Francis Shirk,  
Martha Smith, Arthur Tait, James Tremelin, Helen Yocum

**Trinity, Alliance**

Richard Lamont, Elda Nogle, Stuart Tolle

**St. Andrew's, Barberton**

Henry Centea, Janice Centea, William Dana, Pauline Harris, Phyllis Hubinger, Josephine Muffet, Rebecca Muffet, Roger Rhoades

**St. Paul's, Bellevue**

Dawn Gilbert

**St. Thomas's, Berea**

Tom Bretz, Monika Pring, William Rimko, Barbara Yungwirth

**St. James's, Boardman**

Ronald Bissett, William Wallace Daggett, Doris B. Keenan

**St. John's, Bowling Green**

Carl Hallberg

**St. Mark's, Canton**

Bill Braster, Ann Cowie, Richard Dodson, Leland Hostetle, Carol Weaver

**St. Paul's, Canton**

Pauline Chagnot, Edward Cox, Daniel Davis, Josephine Gerber, Wayne Gerber, June Kelley, Mark King, Eve Plasky, Relna Roud, Gary Rowland, Stuart Tolle

**St. Luke's, Chardon**

John Beharry, Joseph Lane, Eleanor Schmitt

**Trinity Cathedral, Cleveland**

Rocco Gioia, Don Meyers, Georgia Ann Shepard, Louise Simpson, Charlotte van Stolk

**St. Paul's, Cleveland Heights**

Grace Bradley, Dorothea Brown, Ben Candee, Helen Fitzhugh, Raymond Fredman, Flora Daniel Glass, Larry Isard, Rosetta Kerin, Warren Morgan, Joan Nordstrom, Virginia Paterson, Alexander Vehring, Scott Williams

**Trinity, Coshocton**

Francis Miller

**St. John's, Cuyahoga Falls**

Samuel A. Anderson, Joseph Andrew Estes, Phyllis Hope Henry, Beverly M. Murray, Phyllis J. Prinzo, Arthur L. Stube, Roseanne S. Stube, Betty J. Tompkin, Marilyn Anne May Ward

**Grace, Defiance**

George William Cassel, Helen Newton Schultz, Laura Elizabeth Snider

**St. Stephen's, East Liverpool**

Samuel Leonard Bowers, Edith Bowen Dunlap, Eliza Townley Evans,  
Esther Thompson Jones, Lois Appleby Kinsey, Richard C. Mayers, Helen  
Robins Saint, Mary Margaret Waight

**St. Andrew's, Elyria**

James G. Frank, Douglas H. Lillico, Julianne L. McIntire

**Epiphany, Euclid**

Norman Neil Allison, Jr., Raymond Hendershot

**Trinity, Findlay**

Mildred Midge Beers, Ted Black, Gladys Davidson, R. Edward Lodico

**St. Paul's, Fremont**

Imogene Baptista, JoAnne Friedt, Jane Savage

**Harcourt Parish, Gambier**

Cy Wainscott

**Christ Church, Geneva**

Mary Louise Staley, Hubert Bradley Todd

**Christ Church, Hudson**

Roxanne Tanner Bell, Martha French, Dorothy Mae Hill,  
Jane Sterenberg, Roy Nicholas Vasu

**Christ Church, Kent**

Gertrude A. Shore Crawford, Ruth Eileen Daniels, Margaret Frances  
Gleason, Steven George Hashman, Friend Hans Kierstead, Jr., Rita Ann  
McManaway Kilchenman, Joyce Roberts Logan, Sara Elizabeth Nolte,  
John Waller Reed, Gregory Alan Rhinehalt, John Bartshe  
Simpson, Sr., Dorothea Mae Stalder, Helen Irene Weaver, Charles Aus-  
tin Williams II

**St. Hubert's, Kirtland Hills**

B. Holly Broadbent, Heath Oliver

**Ascension, Lakewood**

Leona Alice Dusenbury, Marilyn Mae Johnson, Marianna Reed Kelly,  
Jack Maxfield

**St. Peter's, Lakewood**

John Askine, Mary B. Barger, John Cain, Theodore F. Gerus, Helen  
Guthery, Grace Hyde, Robert Lacey, Phyllis Mucha, William Nichols,  
Wayne Sanger, Mary Vaughan Williams

**Holy Trinity, Lisbon**

Thelma Dailey, Doris Eells, George Eells, Eugene McLaughlin,  
Lawrence Reynolds

**Redeemer, Lorain**

James F. Cowie, Stewart Norman Little, Patricia Valatka,  
Eva Celestine Pino Woodruff, Eugene Yohn

**Good Shepherd, Lyndhurst**

Michele Allen, Al Caron, Betty Feltham, Barb Hengesbach,  
Emelie Rees

**St. Timothy's, Macedonia**

Bruce Bromley, Marie Larsen Dickinson, Glen B. Morgan, George Peter-  
son, Arthur A. Rallya, Veronica Tomaselli

**St. Paul's, Marion**

Jeanne Ellen Boncutter, Grace Evelyn Symansic

**St. Timothy's, Massillon**

Sally Jo Butterfield, Virginia A. Kerr, Charles Little, Robert Myers, Edna  
Rice, Isabel F. Seffens

**St. Paul's, Maumee**

Virginia Beck, June Emerson Cartwright, Susan Hayes, Clement Michael  
Jahn, Felia Ford LeBoutillier, Gretchen Lyon, Adelaide G. Morse, Caro-  
line Orser, Maxine Schrader

**St. Bartholomew's, Mayfield Village**

Virginia Anderson, Verna L. Baxter, Sam Benniel, Margaret D. Cudlip,  
William Lloyd Dixon, Michael H. Doran, Sueann Gregory, Francis Heydt,  
Robert Hunscher, Edward Jakse, Kathleen Jakse, Mary R.  
Kenney, Clara Kieber, Mary Jane Limmex, F. B. Riek, Margaret M. Scott,  
Matthew Schnirel, James Schultz, Suzy Steele, Marie Vlack, Jennifer  
Lynn Werber, Richard L. Wright

**St. Paul's, Medina**

Jean Marie Bean, John Bostwick III, Sherry Klabbatz Fazio, Thomas B.  
Hambuechen, Michael Hiltner, Lloyd Treleaven

**St. Andrew, Mentor**

Barbara Hamilton, Sybil Howells, Robert Johnson, Harold Ours,  
Judith Powers, Lynn Powers, Terry Russell, Agnes Serbin

**St. Paul's, Mount Vernon**

John T. Cramer, Donna Jo Lindstrom, Helen Brooks Conley Tiedeman

**St. Luke's, Niles**

John C. Baer, Gloria Jean Peteritis

**St. Paul's, Norwalk**

Catherine Pulford Lawrie

**Christ Church, Oberlin**

Marianna Hubbard Mercer

**St. Paul's, Oregon**

Charles Mitchell

**St. James', Painesville**

Joyce E. (Creed) Chapman, Burritt S. Hubbard, Jr., Michael F. Prideaux, Thomas F. Stoye

**All Saints, Parma**

Barbara Ann Burke, Kimberly Anne Kustra, Lucy Mary Savarda

**St. Timothy's, Perrysburg**

Mary Boyd, Bob Coon, Michael Horton, Sev Joyce, Ed Wheelden

**St. Thomas, Port Clinton**

Lee Hartlaub, Elizabeth Ann Neidecker

**St. Paul's, Put-in-Bay**

John 'Doc' Scarpelli, Norma Wasson

**Our Saviour, Salem**

Sarabelle Ellis, Betty Pidgeon,  
Mary Louise Barry, Dawn Conklin, Donald Steele

**Grace, Sandusky**

Elizabeth Roberta Hartman, Ruth Bernice Poeschl, Edwin Frederick Roberts, Jr., Margret Mary (Polly) Smith

**Christ Church, Shaker Heights**

Jacqueline P. Hudson, Alice Michel, George L. Mines, Jr., Constance B. Rusnak, Lloyd M. Shears

**St. Andrew's, Toledo**

Frances M. Hollabaugh Cochran, Richard M. Hughes, Anna "Polly Jeffery", Ev Lautzenheiser, Mariella Snell, William R. Steitz, Nancy Margaret Young

**St. Mark's, Toledo**

Richard Entenmann, John Merriam, Frank Moses, Margaret Stanberry, Roberta Toensing

**St. Matthew's, Toledo**

Jane Ellen Pile, Nannette Fulmer Ward

**St. Michael's-in-the-Hills, Toledo**

Robert E. Bailey, Mary Jane Deguez, Margaret Fritz, Elizabeth Morris,  
Gerry Spare, Betty Stykemain

**Trinity, Toledo**

Helen Eyster, Samantha Kuohn, Donald Sorter, Carol Statum,  
Earl Wright

**New Life, Uniontown**

Irene Zela Brown

**St. Mark's, Wadsworth**

Wayne Senger

**Christ Church, Warren**

Margaret "Megan" Day Boltres, Ethel Kaulback, Georget Hubert LeB-  
run, Dennis Lewis, Dennis L. Pardee, Ted Pippenger, Lois Sue Snelson,  
Ferdinand Joseph Weaver

**Grace, Willoughby**

Albert Merhar

**St. James, Wooster**

Benjamin Thomas Anfang, Nancy Nicholson Slaydon, Florence E.  
Sprosty

**St. John's Youngstown**

Kathryn V. Conner, Ruth Ann Harrison, Marjorie J. Kidston, Dennis  
Lewis, Sylvia Rose Melnek, Carl H. Sturdevant

# **Appendix II**

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## **Reports to the Convention**



# Report of the Treasurer

## Annual Report of the Treasurer to the 193<sup>rd</sup> Convention

My responsibility is to report on:

- *The Joint Investment Fund*
- *Financial Condition of the Diocese, and*
- *Parish Reporting Compliance*

### Joint Investment Fund

The Joint Investment Fund, or JIF, is a pooled investment fund which is overseen by the Trustees of the Diocese of Ohio.

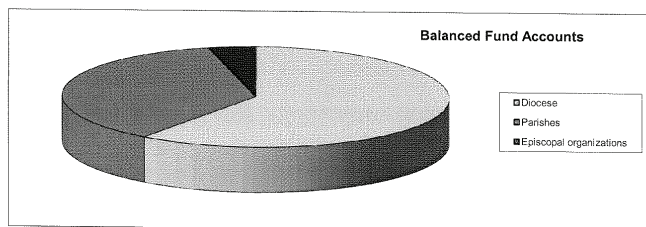
There are two investment options: A balance fund, which invests in equities and fixed income securities, and a money market fund, which is appropriate for short-term funds where the investor seeks no risk to principal and liquidity.

Tom Hartland of Hartland & Co., investment advisers, will be speaking later today on their work with the Trustees.

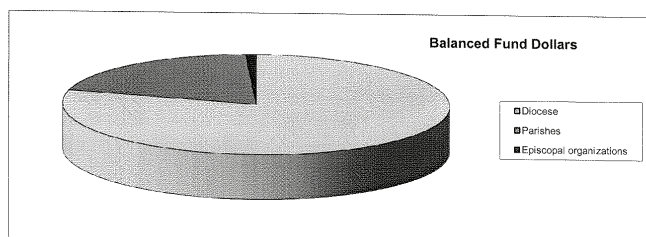
The following graphs show the allocation of accounts and dollars among the categories of participants, the Diocese, parishes and Episcopal organizations in both the Balanced Fund and the Money Market Fund. The Diocese owns the majority of accounts and dollars in both funds.

#### BALANCED FUND

Diocese	135	60%
Parishes	82	36%
Episcopal organizations	9	4%
<b>Total accounts</b>	<b>226</b>	<b>100%</b>

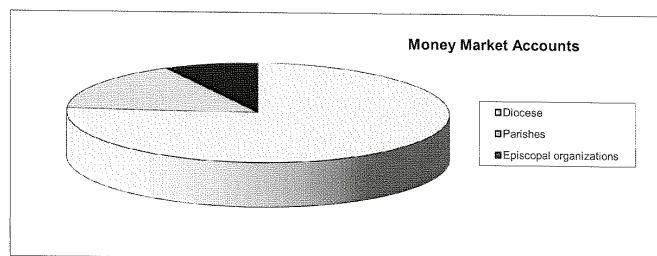


Diocese	\$ 24,864,962	79%
Parishes	6,306,459	20%
Episcopal organizations	274,298	1%
<b>Total dollars</b>	<b>\$ 31,445,719</b>	<b>100%</b>

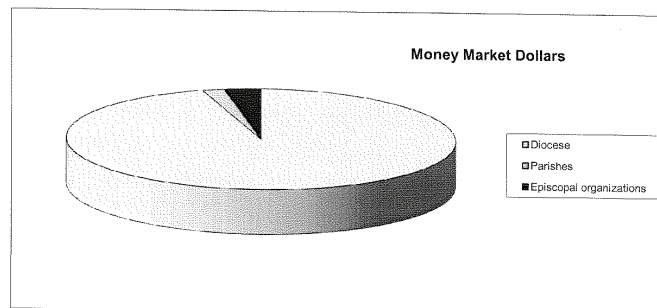


#### MONEY MARKET FUND

Diocese	19	76%
Parishes	4	16%
Episcopal organizations	2	8%
<b>Total accounts</b>	<b>25</b>	<b>100%</b>



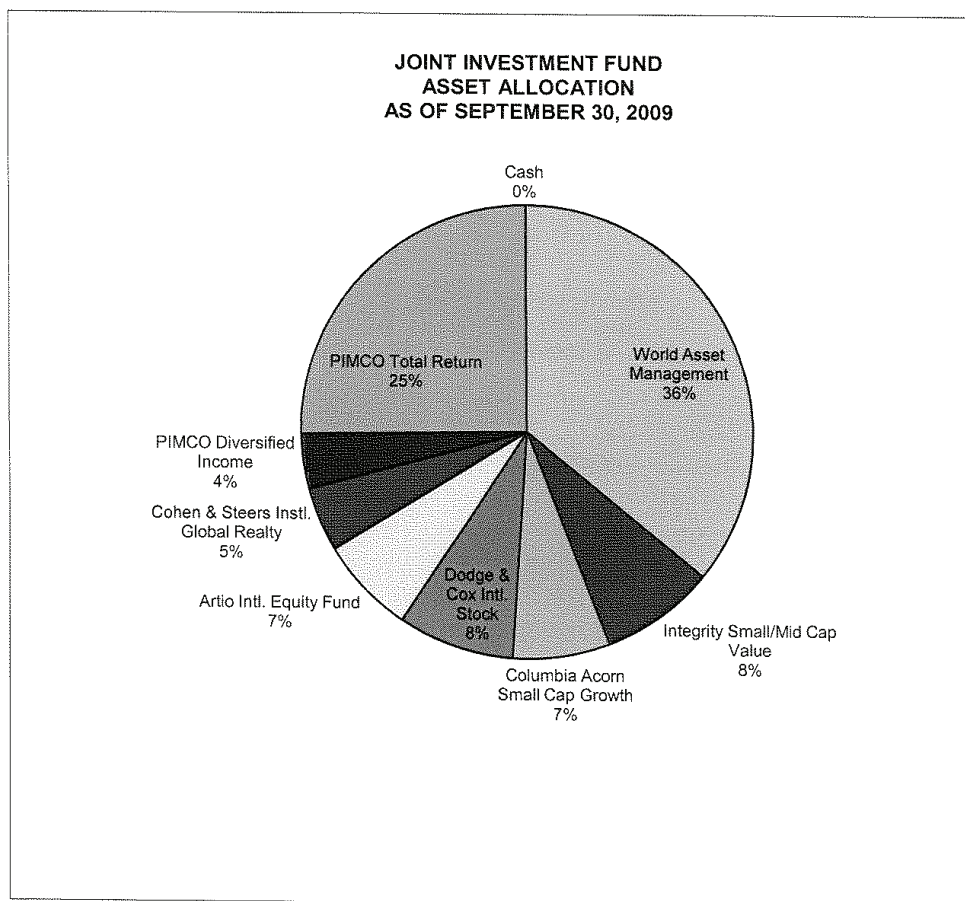
Diocese	\$ 1,108,667	95%
Parishes	21,261	2%
Episcopal organizations	35,335	3%
<b>Total dollars</b>	<b>\$ 1,165,263</b>	<b>100%</b>



The information below represents the asset allocation of the Balanced Fund at September 30, 2009 and the year-to-date performance. The Fund is outperforming its benchmark return by 4.5% and is well-diversified. The Money Market Fund is invested in Treasury Money Market funds for safety and liquidity.

**JOINT INVESTMENT FUND  
PERFORMANCE FOR 9 MONTHS ENDED SEPTEMBER 30, 2009**

Account	Market Value	9-month return	Index return
World Asset Management	\$ 11,276,938	18.80%	19.30%
Integrity Small/Mid Cap Value	2,586,112	24.80%	22.00%
Columbia Acorn Small Cap Growth	2,194,761	33.50%	34.20%
Dodge & Cox Intl. Stock	2,614,241	44.40%	21.20%
Artio Intl. Equity Fund	2,171,681	22.00%	29.60%
Cohen & Steers Instl. Global Realty	1,435,514	33.00%	27.40%
PIMCO Diversified Income	1,231,629	27.00%	5.70%
PIMCO Total Return	7,921,750	12.70%	5.70%
Cash	13,093		
<b>Total Balanced Fund</b>	<b>\$ 31,445,719</b>	<b>22.10%</b>	<b>17.60%</b>



The tables below detail the activity for both Funds for the twelve months ended September 30, 2009.

The Balance Fund activity reflects a significant positive return for the fund this year. The realized loss of \$3.3 million was primarily due to the transition in the investment managers last fall, which is expect to be a rare event. The unrealized gain (loss) is almost \$735 million higher than the 12 month ended 9/30/2008.

Under the current structure for the Fund, the expenses are about .53% of assets. Other expenses in 2009 are comparable to 2008.

The most significant difference in the Money Market Fund activity is the reduction of income earned, due to interest rates being at historic lows.

**Joint Investment Fund  
Balanced Fund Income Statement**

		For the Twelve Months Ended		
		9/30/2009	9/30/2008	Difference
<b>Revenues</b>				
0300-4105-10	Participations Issued - Additions	\$139,934.51	\$505,417.90	(\$365,483.39)
0300-4107-20	Participations Issued - Reinvested Income	\$508,555.66	\$519,100.59	(\$10,544.93)
0300-4110-20	Bond Interest	\$69,366.47	\$445,510.39	(\$376,143.92)
0300-4115-20	Money Market Interest	\$1,272.81	\$53,662.35	(\$52,389.54)
0300-4120-20	Dividend Income	\$1,456,167.54	\$562,884.92	\$893,282.62
0300-4125-20	Realized Gain (Loss)	(\$3,322,051.30)	(\$201,132.31)	(\$3,120,918.99)
0300-4130-20	Unrealized Gain (Loss)	\$2,829,942.15	(\$4,625,161.74)	\$7,455,103.89
<b>Total Revenues</b>		<b>\$1,683,187.84</b>	<b>(\$2,739,717.90)</b>	<b>\$4,422,905.74</b>
<b>Expenses</b>				
0300-5105-20	Bank Administration Fee	\$25,073.24	\$1,775.67	(\$23,297.57)
0300-5110-20	Investment Management Fee	\$28,413.58	\$202,148.01	\$173,734.43
0300-5112-20	Investment Advisory & Consulting Fees	\$39,740.00	\$36,551.00	(\$3,189.00)
0300-5120-20	Administration Fees	\$74,339.06	\$79,609.08	\$5,270.02
0300-5122-20	Income Distributed - Transfer to Money Market Fund	\$79,498.77	\$89,307.77	\$9,809.00
0300-5124-20	Income Distributed - Cash	\$918,182.30	\$964,970.30	\$46,788.00
0300-5126-20	Income Distributed - Reinvestment	\$508,555.66	\$519,100.59	\$10,544.93
0300-5140-20	Principal Withdrawals	\$733,790.38	\$774,049.07	\$40,258.69
0300-5145-20	Participant Terminated Funds	\$11,950.23	\$54,512.52	\$42,562.29
<b>Total Expenses</b>		<b>\$2,419,543.22</b>	<b>\$2,722,024.01</b>	<b>\$302,480.79</b>
<b>NET SURPLUS/(DEFICIT)</b>		<b>(\$736,355.38)</b>	<b>(\$5,461,741.91)</b>	<b>\$4,725,386.53</b>

**Joint Investment Fund  
Money Market Income Statement**

		For the Twelve Months Ended		
		9/30/2009	9/30/2008	Difference
<b>Revenues</b>				
0400-4105-10	Participations Issued - Additions	\$62,613.24	\$69,266.31	(\$6,653.07)
0400-4107-20	Participations Issued - Reinvested Income	\$810.55	\$43,531.06	(\$42,720.51)
0400-4109-20	Participations Issued - Transfer from Balanced Fund	\$79,498.77	\$89,307.77	(\$9,809.00)
0400-4115-10	Money Market Interest	\$1,485.89	\$44,314.83	(\$42,828.94)
<b>Total Revenues</b>		<b>\$144,408.45</b>	<b>\$246,419.97</b>	<b>(\$102,011.52)</b>
<b>Expenses</b>				
0400-5105-20	Bank Administration Fee	\$419.23	\$44.97	(\$374.26)
0400-5124-20	Income Distributed - Cash	\$19.65	\$738.80	\$719.15
0400-5126-20	Income Distributed - Reinvestment	\$810.55	\$43,531.06	\$42,720.51
0400-5140-20	Principal Withdrawals	\$72,500.26	\$127,822.86	\$55,322.60
<b>Total Expenses</b>		<b>\$73,749.69</b>	<b>\$172,137.69</b>	<b>\$98,388.00</b>
<b>NET SURPLUS/(DEFICIT)</b>		<b>\$70,658.76</b>	<b>\$74,282.28</b>	<b>(\$3,623.52)</b>

### Diocesan Financial Activity

The table below reflects the Operating Budget of the Diocese which is overseen by Diocesan Council.

It is typical to have a deficit through nine months. The deficit this year is significantly less than expected in the budget and less than a comparable period a year ago.

Our biggest concern about the budget at this point is support from congregations. Assessments for the year are expected to fall short of the budget by \$200,000-\$250,000, due to the effects on the recent economic downturn. Most of the short fall is expect to be offset by lower than budgeted spending on personnel for the first eight months and good financial stewardship by the Bishop's staff.

## Episcopal Diocese of Ohio Program Budget Report-Variiances

Nine Months Ended September 30, 2009						
	Total Actual	YTD Budget	Favorable (Unfavorable)	YTD 9/30/2008	Favorable (Unfavorable)	
RECEIPTS						
SUPPORT FROM CONGREGATIONS	\$ 1,512,938.00	\$ 1,668,400.00	\$ (155,462.00)	\$ 1,596,021.00	\$ (83,083.00)	
ENDOWMENT INCOME	\$ 248,937.00	\$ 248,379.00	\$ 558.00	\$ 243,181.00	\$ 5,756.00	
TOTAL INVESTMENT INCOME - OTHER	\$ 103,362.00	\$ 103,676.00	\$ (314.00)	\$ 108,283.00	\$ (4,921.00)	
REIMBURSEMENTS	\$ 128,700.00	\$ 128,700.00	\$ -	\$ 125,205.00	\$ 3,495.00	
OTHER RECEIPTS	\$ 2,230.00	\$ 3,000.00	\$ (770.00)	\$ 298.00	\$ 1,932.00	
FROM SPECIAL FUNDS	\$ 300,683.00	\$ 383,202.00	\$ (82,519.00)	\$ 366,508.00	\$ (65,825.00)	
TOTAL RECEIPTS	\$ 2,296,850.00	\$ 2,535,357.00	\$ (238,507.00)	\$ 2,439,496.00	\$ (142,646.00)	
EXPENSES						
MINISTRIES OFFICE	\$ 156,022.00	\$ 157,982.00	\$ 1,960.00	\$ 171,972.00	\$ 15,950.00	
CONGREGATIONS AND CHRISTIAN FORMATION	\$ 166,370.00	\$ 211,500.00	\$ 45,130.00	\$ 178,204.00	\$ 11,834.00	
PEACE AND JUSTICE	\$ -	\$ -	\$ -	\$ 120.00	\$ 120.00	
DIOCESAN, EPISCOPAL CHURCH & ANGLICAN COMMUNION	\$ 513,411.00	\$ 468,135.00	\$ (45,276.00)	\$ 449,648.00	\$ (63,763.00)	
COLLABORATIVE MINISTRIES	\$ 70,043.00	\$ 114,475.00	\$ 44,432.00	\$ 110,608.00	\$ 40,565.00	
OFFICE OF THE BISHOP	\$ 22,190.00	\$ 30,075.00	\$ 7,885.00	\$ 25,924.00	\$ 3,734.00	
FINANCE OFFICE	\$ 42,368.00	\$ 36,850.00	\$ (5,518.00)	\$ 42,652.00	\$ 284.00	
DEVELOPMENT OFFICE	\$ 34,726.00	\$ 40,475.00	\$ 5,749.00	\$ 47,524.00	\$ 12,798.00	
COMMUNICATIONS OFFICE	\$ 45,218.00	\$ 94,742.00	\$ 49,524.00	\$ 69,730.00	\$ 24,512.00	
PERSONNEL	\$ 986,916.00	\$ 1,144,910.00	\$ 157,994.00	\$ 1,072,884.00	\$ 85,968.00	
STAFF TRAVEL REIMBURSEMENT	\$ 38,995.00	\$ 60,000.00	\$ 21,005.00	\$ 49,677.00	\$ 10,682.00	
OFFICE EXPENSES (TRINITY COMMONS)	\$ 190,825.00	\$ 205,912.00	\$ 15,087.00	\$ 195,844.00	\$ 5,019.00	
OFFICE EQUIPMENT AND SUPPLIES	\$ 21,036.00	\$ 14,325.00	\$ (6,711.00)	\$ 43,792.00	\$ 22,756.00	
MISC	\$ 310,374.00	\$ -	\$ (310,374.00)	\$ 457,727.00	\$ 147,353.00	
TOTAL EXPENSES	\$ 2,598,494.00	\$ 2,579,381.00	\$ (19,113.00)	\$ 2,916,306.00	\$ 317,812.00	
FUND TRANSFERS						
INTER FUND TRANSFERS	\$ (148,404.00)	\$ (114,000.00)	\$ (34,404.00)	\$ (148,255.00)	\$ 149.00	
INTRA FUND TRANSFERS	\$ 360,262.00	\$ (31,500.00)	\$ 391,762.00	\$ 411,485.00	\$ 51,223.00	
TOTAL FUND TRANSFERS	\$ 211,857.00	\$ (145,500.00)	\$ 357,358.00	\$ 263,230.00	\$ 51,372.00	
NET SURPLUS (DEFICIT)	\$ (88,744.00)	\$ (189,524.00)	\$ 137,964.00	\$ (213,580.00)	\$ 123,794.00	

The table below reflects the activity of all Diocesan funds. This report corresponds to the format of our annual audit report.

The nine month results are much stronger than a year ago, primarily due to the recovery of the Joint Investment Fund. Currently about 40% of revenues come from current and prior gifts and income earned on those gifts. There are ample opportunities to expend Diocesan mission through annual and planned giving.

**Episcopal Diocese of Ohio  
Income Statement  
Nine Months Ended September 30, 2009**

	<b>Operating/Property</b>	<b>Custodial</b>	<b>Endowment</b>	<b>Total</b>	<b>Total 9/30/2008</b>
<b>Revenue</b>					
Assessment Income	\$1,512,938.00	\$0.00	\$0.00	\$1,512,938.00	\$1,596,021.00
Cedar Hills	\$69,951.00	\$0.00	\$0.00	\$69,951.00	\$101,325.00
Joint Investment Fund	\$327,923.00	\$495,116.19	\$87,013.00	\$910,052.19	\$913,127.00
Realized and Unrealized Gain (Loss)	\$50,178.00	\$515,996.16	\$2,183,086.00	\$2,749,260.16	(\$3,861,100.00)
Appreciation on Funds Held in Trust	\$0.00	\$0.00	\$193,385.00	\$193,385.00	(\$416,063.00)
Interest	\$40,007.00	\$83,757.63	\$105.00	\$123,869.63	\$145,109.00
Other Income	\$131,230.00	\$47,311.00	\$0.00	\$178,541.00	\$120,904.00
Contributions and Offerings	\$2,015.00	\$345,853.00	\$9,195.00	\$357,063.00	\$331,499.00
Trinity Commons Books & Gifts	\$74,511.00	\$0.00	\$0.00	\$74,511.00	\$76,847.00
Net Assets Released from Restrictions	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Revenue</b>	<b>\$2,208,753.00</b>	<b>\$1,488,033.98</b>	<b>\$2,472,784.00</b>	<b>\$6,169,570.98</b>	<b>(\$992,331.00)</b>
<b>Expense</b>					
Diocesan, Episcopal Church & Anglican Communion	\$513,411.00	\$0.00	\$0.00	\$513,411.00	\$449,442.00
Clergy	\$19,834.00	\$0.00	\$0.00	\$19,834.00	\$16,328.00
Congregations	\$121,120.00	\$0.00	\$0.00	\$121,120.00	\$137,552.00
Peace and Justice	\$0.00	\$0.00	\$0.00	\$0.00	\$120.00
Specialized Ministries	\$68,034.00	\$0.00	\$2,009.00	\$70,043.00	\$110,206.00
Technical Support and Services	\$1,574,806.00	\$178,962.00	\$0.00	\$1,753,768.00	\$1,853,519.00
Cedar Hills	\$255,380.00	\$0.00	\$0.00	\$255,380.00	\$328,993.00
Trinity Commons Books & Gifts	\$122,364.00	\$0.00	\$0.00	\$122,364.00	\$103,851.00
Capital Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$12,614.00
Education	\$0.00	\$133,335.00	\$0.00	\$133,335.00	\$99,425.00
Other Grants	\$0.00	\$381,918.00	\$108,610.00	\$490,528.00	\$483,761.00
Special Assistance to Clergy	\$0.00	\$10,453.00	\$0.00	\$10,453.00	\$63,661.00
Depreciation	\$59,484.00	\$135,564.00	\$0.00	\$195,048.00	\$199,647.00
Other	\$115.00	\$164,357.00	\$7,503.00	\$171,975.00	\$93,447.00
<b>Total Expenses</b>	<b>\$2,734,548.00</b>	<b>\$1,004,589.00</b>	<b>\$118,122.00</b>	<b>\$3,857,259.00</b>	<b>\$3,952,566.00</b>
Ownership Allocation Adjustment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Transfers	(\$37,698.00)	\$37,098.00	\$600.00	\$0.00	\$0.00
<b>NET SURPLUS/(DEFICIT)</b>	<b>(\$488,097.00)</b>	<b>\$446,346.98</b>	<b>\$2,354,062.00</b>	<b>\$2,312,311.98</b>	<b>(\$4,944,897.00)</b>

The table below is the Balance Sheet of the Diocese as of September 30<sup>th</sup>, a snapshot of assets, liabilities and net assets at that date.

Sound Financial Practices of balanced budgets, avoiding debt, and prudent spending have contributed to an excellent financial position of the Diocese. We have been able to weather the recent recession better than we would have if these practices had not been maintained.

**Episcopal Diocese of Ohio**  
**Balance Sheet**  
as of September 30, 2009

	Operating/Property	Education	L & Grant	Other Custodial	Endowments	Total All Funds
<b>ASSETS</b>						
CURRENT ASSETS						
CASH & EQUIVALENTS	\$313,050.00	\$112,409.00	(\$15,692.00)	\$1,347,624.00	\$77,400.00	\$1,834,791.00
MARKETABLE SECURITIES	\$553,090.00	\$311,420.00	\$1,557,157.00	\$3,256,019.00	\$18,899,573.00	\$24,577,259.00
RECEIVABLES	\$88,088.00	\$7,917.00	\$18,372.00	\$331,048.00	\$56,596.00	\$502,021.00
OTHER	\$134,993.00	\$0.00	\$0.00	\$0.00	\$0.00	\$134,993.00
TOTAL CURRENT ASSETS	\$1,089,221.00	\$431,746.00	\$1,559,837.00	\$4,934,691.00	\$19,033,569.00	\$27,049,064.00
OTHER ASSETS						
OTHER ASSETS	\$0.00	\$0.00	\$0.00	\$0.00	\$1,655,801.00	\$1,655,801.00
LOANS AND NOTES RECEIVABLE	\$41,731.00	\$0.00	\$93,286.00	\$0.00	\$0.00	\$135,017.00
PROPERTY & EQUIPMENT	\$790,868.00	\$0.00	\$0.00	\$3,931,967.00	\$0.00	\$4,722,835.00
TOTAL ASSETS	\$1,921,820.00	\$431,746.00	\$1,653,123.00	\$8,866,658.00	\$20,689,370.00	\$33,562,717.00
<b>LIABILITIES AND NET ASSETS</b>						
CURRENT LIABILITIES						
PAYABLES	\$75,170.00	\$0.00	\$0.00	\$158,343.00	\$0.00	\$233,513.00
TOTAL CURRENT LIABILITIES	\$75,170.00	\$0.00	\$0.00	\$158,343.00	\$0.00	\$233,513.00
OTHER LIABILITIES						
LOAN PAYABLE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
DEPOSITS	\$7,127.00	\$0.00	\$0.00	\$150.00	\$0.00	\$7,277.00
UNEARNED INTEREST INCOME	\$0.00	\$0.00	\$5,506.00	\$0.00	\$0.00	\$5,506.00
TOTAL OTHER LIABILITIES	\$7,127.00	\$0.00	\$5,506.00	\$150.00	\$0.00	\$12,783.00
NET ASSETS	\$1,839,523.00	\$431,746.00	\$1,647,617.00	\$8,708,165.00	\$20,689,370.00	\$33,316,421.00
TOTAL LIABILITIES AND NET ASSETS	\$1,921,820.00	\$431,746.00	\$1,653,123.00	\$8,866,658.00	\$20,689,370.00	\$33,562,717.00

Below is the income statement of Cedar Hills Camp & Conference Center for the first 9 months this year. Cedar Hills is expected to break even for the year, and the current nine month operating structure (March-Nov) will continue into 2010.

**Income Statement - Cedar Hills Camp & Conference Center  
For Nine Months Ended September 30, 2009**

	Actual	Annual Budget	9/30/2008
<b>RECEIPTS</b>			
Endowment Income	17,100.00	22,800.00	16,868.00
Fees	69,656.00	127,591.00	101,107.00
Other Receipts	2,290.00	16,000.00	2,568.00
<b>TOTAL RECEIPTS</b>	<b>89,046.00</b>	<b>166,391.00</b>	<b>120,543.00</b>
<b>EXPENSES</b>			
Food Service Expenses	25,836.00	33,000.00	31,453.00
Lodging Services Expenses	26,907.00	37,900.00	47,422.00
Program Expenses	9,775.00	16,100.00	16,315.00
Fund Raising Expenses	6,106.00	6,200.00	5,895.00
Facility Overhead	59,568.00	81,400.00	63,054.00
Administrative Overhead	15,973.00	23,150.00	16,525.00
Personnel Expenses	111,216.00	145,641.00	148,621.00
<b>TOTAL EXPENSES</b>	<b>255,381.00</b>	<b>343,391.00</b>	<b>329,285.00</b>
<b>TRANSFERS AND ADJUSTMENTS</b>	<b>143,504.00</b>	<b>177,000.00</b>	<b>155,406.00</b>
<b>Net Surplus (Deficit)</b>	<b>(22,831.00)</b>	<b>-</b>	<b>(53,336.00)</b>

Below is the income statement for the bookstore for 9 months. This loss this year is considerable more than last year, due to transition cost related to personnel and changing the inventory mix. The Vestry of Trinity Cathedral and Diocesan Council decided to terminate operation of the bookstore next month, due to an unsustainable level of operating losses.

**Income Statement - Trinity Commons Books & Gifts  
For Nine Months Ended September 30, 2009**

	9/30/2009	9/30/2008	Variance
<b>RECEIPTS</b>			
Store Sales	74,358.00	76,490.00	(2,132.00)
Booksense Sales	16.00	53.00	(37.00)
Other Receipts	144.00	367.00	(223.00)
<b>TOTAL RECEIPTS</b>	<b>74,518.00</b>	<b>76,910.00</b>	<b>(2,392.00)</b>
<b>EXPENSES</b>			
Cost of Goods Sold - Store	59,314.00	47,426.00	11,888.00
Affiliate Expenses	-	6.00	(6.00)
Sales & Marketing Expense	2,635.00	3,185.00	(550.00)
Personnel Expenses	50,949.00	46,934.00	4,015.00
Administrative Expenses	9,459.00	6,456.00	3,003.00
<b>TOTAL EXPENSES</b>	<b>122,357.00</b>	<b>104,007.00</b>	<b>18,350.00</b>
<b>TRANSFERS AND ADJUSTMENTS</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net Surplus (Deficit)</b>	<b>(47,839.00)</b>	<b>(27,097.00)</b>	<b>(20,742.00)</b>



### **Parish Reporting Compliance**

#### *2008 Parochial Reports*

These were due March 1<sup>st</sup>. To date, only one parish has not submitted a report.

#### *2008 Audits*

Committee Audits were due June 1<sup>st</sup>, and CPA and Diocesan Audit Team audits were due July 15<sup>th</sup>. To date, 85 of 90 audits have been received. The Diocesan audit team performed audits for 28 parishes this year, versus 12 last year, and we anticipate continuing to expand the audit team in the future.

#### *2008 Lay Pension Reports*

These reports are due October 1<sup>st</sup>. All but two parishes have sent in a report.

The Finance Office is available to work with parishes to assist with filing these reports. Timeliness of filing continues to be concern.

## **The Trustees of the Diocese of Ohio**

**Number of Regular Meetings:** 4

**Number of Special Meetings:** 0

**Officers:** John F. Shelley, President

**Members:** Lael Carter, St. Paul's, Cleveland Heights  
Mike Bickerton, St. Peter's, Lakewood  
The Rev. Meghan Froehlich, Church of Our Saviour, Akron  
John F. Shelley, Esq., Christ Church, Shaker Heights  
The Rev. Dr. C. Eric Funston, St. Paul's, Medina

1) The purpose of The Trustees of the Diocese of Ohio is to oversee the investment management and administration of the Joint Investment Fund, hold title to property from closed or imperiled parishes, and dispose of acquired property as authorized. These duties may include authorizing expenditure from accounts of the Joint Investment Fund, setting an annual spending rate, and hiring managers, advisers, and custodians for the funds.

**Actions taken:**

*Authorized a total of \$182,076 to the ECSF Development Council for Church Home grants;  
Authorized a spending rule of 4% for 2010;  
Transferred the title of St. Paul's Church in Put-in-Bay, Ohio back to the parish;  
Approved the sale of the parish building in Bryan, Ohio, formerly used by Trinity Church, for the price of \$62,500;  
Authorized \$250,000 from operating reserves of the Diocese to fund legal fees in connection with property disputes with 5 parishes in the Diocese;  
Authorized the withdrawal of \$30,239 from the ISTE A Proceeds to be transferred to Cedar Hills Camp and Conference Center to cover its 2008 operating deficit; and  
Accepted the 2008 audit of The Joint Investment Fund of the Trustees of the Diocese of Ohio, conducted by Plante & Moran, LLC.*

2) At its last meeting of the calendar year, usually held in December, the Trustees approve a budget for the succeeding calendar year. For 2009, the total budget is \$80,450, which includes expenditures for accounting and administrative work performed by the Diocese of Ohio, \$73,200; an audit fee of \$5,000; and \$2,250 for copies and postage and bank fees.

**The Diocese of  
Ohio Diocesan  
Council Annual  
Report to the  
193<sup>rd</sup> Convention  
November 14,  
2008 - November  
12, 2009**

**Meetings:** 7 (Regular)

**Officers:** President, The Rt. Rev. Mark Hollingsworth, Jr.  
Secretary, Tom Austin

***December 6, 2008***

Motion passed to approve the October 4, 2008 minutes.  
Approved the 2009 housing allowances for clergy as distributed.  
Approved a grant to St. Paul's, Oregon to pay off the balance of a loan for roof repairs.  
Approved a partial grant to St. Stephen's, East Liverpool for parking lot paving.  
Passed a motion to authorize the establishment of a Diocesan Council Executive Committee.  
Elected David Bargetzi and Don Meyers as representative-at-large of Diocesan Council.  
Passed a motion to keep the Bishop's salary the same as in 2008.

***January 29, 2009***

Motion passed to approve the December 6, 2008 minutes.  
Passed a motion to approve the financial report.  
Approved an eight-month operating budget for Cedar Hills.  
Approved entering into a joint operating agreement with Trinity Cathedral, splitting the burden of any deficits 50/50 up to \$15,000/year, and adopting the 2009 Operating Budget written by Michael Lawrence pending his conversation with Sue Leishman and Alan James.

***March 28, 2009***

A quorum was not present.

***May 7, 2009***

A quorum was not present.

***June 11, 2009***

Motions passed to approve the minutes for the January 29, March 28, and May 7, 2009 meetings.  
Approved a resolution regarding the change of address and authorized signers on bank accounts for St. John's, Cleveland.  
Authorized staff to communicate with the Executive Committee regarding the financial status of Trinity Commons Books and Gifts.  
Authorized the Executive Committee with the authority to notify Trinity Cathedral of opting out of the joint management agreement.

**September 17, 2009**

Motion passed to approve the minutes for the June 11, 2009 meeting.

Approved housing allowance for 2009 for new clergy on staff.

Approved resolution for the Chief Financial Officer to close the checking accounts in the name of the Diocese of Ohio at Fifth Third Bank and proceeds be transferred to a new checking account at U.S. Bank in Cleveland, and authorized her to execute the needed documents to establish the new account.

Approved resolution authorizing signers of the new checking.

Passed a resolution authorizing the Bishop and

Commission for Global and Domestic Mission to make decisions jointly regarding allocations from the Domestic and International Mission and Service Projects line item of the Diocesan Operating Budget.

Motion passed to submit the 2010 budget as reviewed to Diocesan Convention with the recommendation to approve.

Motion passed to present to Diocesan Convention the resolution from the Commission on Global and Domestic Mission, recommending the Diocese explore intentional covenanted relationships with the Diocese of Tanga and the Diocese of Belize.

Motion passed to commit to pay 1/2 of the Trinity Commons Books and Gifts 2009 deficit, even if it exceeds \$15K.

**October 17, 2009**

Motion passed to approve the September 17, 2009 minutes with corrections.

Approved housing allowance for 2009 for new clergy on staff.

Motion passed to approve grant to St. Stephens, Steubenville.

Motion passed to approve grant and loan to St. James, Painesville.

Motion passed to approve budget for Cedar Hills.

Approved motion to recommend canonical changes to Title II Canon 3 to the 193<sup>rd</sup> Annual Convention.

Motion passed to have Bishop Hollingsworth, Alan James, Sue Leishman, and Tracey Lind communicate with the vestry of Trinity Cathedral regarding Trinity Commons Books and Gifts to collaborate in discernment.

## The **Standing Committee** of the **Diocese** of **Ohio**

*Meetings:* 7 (Regular)

*Officers:* President, Celia Smart  
Secretaries, The Rev. Margaret Holt Sammons

***Consented to the Election of:***

Bishop Coadjutor, Long Island  
Two Bishop Suffragans, Los Angeles  
James Scott Mayer, Bishop, Northwest Texas  
Bishop Coadjutor, Springfield

***Declined Consent to the Ordination of:***

Kevin Threw Forrester, Bishop, Northern Michigan

***Consented to the Reception as Priest***

Daniel Knaup, from the Roman Catholic Church

***Consented to the Ordination to the Priesthood:***

George Baum  
Matthew Humm  
Jennifer Leider  
David Nelson

***Consented to the Ordination to the Diaconate:***

George Baum  
Vincent Black  
Matthew Humm  
Jennifer Leider  
David Nelson

***Consented to Recommendation for Candidacy:***

Audra Abt  
Andrea Dedmon  
Marie Harkey  
Gia Hayes-Martin  
Matthew Humm  
David Nelson  
Christopher (Zeke) Coughlin

***Consented to:***

Transfer of a portion of property from St. Andrew's, Canfield to Austintown Township.

Alienation of a portion of St. Paul's, Mt. Vernon property between the Methodist church and Jim Giles and Associates.

Alienation of Grace, Sandusky property which was completed in August 2009.

Request from St. Paul's, Norwalk to be listed on the National Register of Historic Places.

***Other Business before the Standing Committee:***

Approved request by Trinity Commons to grant a drainage easement to CSU and a fire separation easement to CSU.

**Notices from the Dioceses of:**

<b>Diocese</b>	<b>Action</b>		<b>Name</b>
Albany	Deposition	Sentence of	Kevin Jones
Atlanta	Deposition	Notice of	David Stringer
Central Florida	Renunciation	of the Ministry	Arthur L. Dasher, IV
Central Florida	Renunciation	of the Ministry	J. Boyd Baker
Central Florida	Renunciation	of the Ministry	James E. Byrum
Central Florida	Restoration	of the Ministry	Marcos A. Rivera
Colorado	Deposition	Notice of	Matthew Burnett
Colorado	Deposition	Sentence of	Grace Veena Bunyan
Colorado	Deposition	Sentence of	Dennis Garrou
Colorado	Deposition	Sentence of	Alexander M. Greene
Colorado	Deposition	Sentence of	Kathleen Ruth Jackman
Colorado	Deposition	Sentence of	James C. Paul
Colorado	Deposition	Sentence of	Kenneth Erik Ross
Colorado	Deposition	Sentence of	Gerald Lee Schnackenberg
Colorado	Deposition	Sentence of	Alan L. Sulzenfuss
Colorado	Deposition	Sentence of	Eric W. Zolner
Colorado	Deposition	Sentence of	Lawrence Edward Doyle
Colorado	Deposition	Sentence of	Philip Duane Eberhart
Colorado	Deposition	Sentence of	Paul Anthony Hinson
Colorado	Deposition	Sentence of	Kathy Jeanne King
Colorado	Deposition	Sentence of	Charles W. Reeder
Colorado	Deposition	Sentence of	Elizabeth Joan Sausele
Colorado	Deposition	Sentence of	James Frank Stone
Colorado	Deposition	Sentence of	Emerson Beery Taylor, Jr.
Colorado	Inhibition	Notice of	Matthew Burnett
Colorado	Suspension	Notice of	David Wayne Henderson
Connecticut	Deposition	Notice of	Ronald S. Gauss
Connecticut	Deposition	Notice of	Allyn B. Benedict
Dallas	Deposition	Upon Renunciation of Ministry	William Charles Warnky
Dallas	Restoration	of the Ministry	James C. Biegler
Dallas	Suspension	Notice of	Keith Roberson
Delaware	Deposition	Notice of	Thomas Jensen
Dominican Republic	Deposition	Notice of	Luis Tavarez Tejada
Eastern Michigan	Removal	Declaration of Removal and Release	Adedokun Adewunmi
Eastern Michigan	Removal	Upon Voluntary Renunciation of Ministry	Allyce Pifer
El Camino Real	Deposition	Notice of	Edward Denis McNeill
Fond du Lac	Removal	Upon Voluntary Renunciation of Ministry	Robert Wade Frees, Jr.
Fort Worth	Inhibition	Notice of	Jack Leo Iker
Fort Worth	Inhibition	Notice of	Dewayne M. Adams
Fort Worth	Inhibition	Notice of	H. Jay Awood
Fort Worth	Inhibition	Notice of	J. Ronald Baker
Fort Worth	Inhibition	Notice of	Patricia A. Banks
Fort Worth	Inhibition	Notice of	William E. Blewett
Fort Worth	Inhibition	Notice of	Andrew F.L. Bradley
Fort Worth	Inhibition	Notice of	Christopher T. Cantrell
Fort Worth	Inhibition	Notice of	Richard A. Cantrell
Fort Worth	Inhibition	Notice of	Melody Crabb
Fort Worth	Inhibition	Notice of	William A. Crary
Fort Worth	Inhibition	Notice of	Christopher Culpepper
Fort Worth	Inhibition	Notice of	Sergio Diaz
Fort Worth	Inhibition	Notice of	William R. Dickson
Fort Worth	Inhibition	Notice of	Jonothan Duncan

<b>Diocese</b>	<b>Action</b>		<b>Name</b>
Fort Worth	Inhibition	Notice of	James A. Eanes
Fort Worth	Inhibition	Notice of	Charles Erlandson
Fort Worth	Inhibition	Notice of	Lana K. Farley
Fort Worth	Inhibition	Notice of	Randall Foster
Fort Worth	Inhibition	Notice of	Roger Grist
Fort Worth	Inhibition	Notice of	Michael Heidt
Fort Worth	Inhibition	Notice of	Dennis W. Helber
Fort Worth	Inhibition	Notice of	Thomas E. Hightower
Fort Worth	Inhibition	Notice of	Charles Hough IV
Fort Worth	Inhibition	Notice of	Cecil Dow James
Fort Worth	Inhibition	Notice of	Stephen W. Jones
Fort Worth	Inhibition	Notice of	Kingsley Obi Jon-Ubabuco
Fort Worth	Inhibition	Notice of	John W. Jordan
Fort Worth	Inhibition	Notice of	Terence N. Jordan
Fort Worth	Inhibition	Notice of	Thomas B. Kennedy
Fort Worth	Inhibition	Notice of	David F. Klein
Fort Worth	Inhibition	Notice of	Edward F. Kresowatty
Fort Worth	Inhibition	Notice of	I. Javier Loyo
Fort Worth	Inhibition	Notice of	Kenneth W. MacKenzie
Fort Worth	Inhibition	Notice of	Timothy M. Matkin
Fort Worth	Inhibition	Notice of	Sandra McCown
Fort Worth	Inhibition	Notice of	Alan E. McGlauchlin
Fort Worth	Inhibition	Notice of	George L. Milyiori
Fort Worth	Inhibition	Notice of	Robert O. Mitchell
Fort Worth	Inhibition	Notice of	Chad Nusbaum
Fort Worth	Inhibition	Notice of	David E. Nyberg
Fort Worth	Inhibition	Notice of	William E. O'Connell
Fort Worth	Inhibition	Notice of	I. Jonathan Oguilofo
Fort Worth	Inhibition	Notice of	Vance C. Page
Fort Worth	Inhibition	Notice of	Timothy P. Perkins
Fort Worth	Inhibition	Notice of	John M. Phelps
Fort Worth	Inhibition	Notice of	Darryl J. Pigeon
Fort Worth	Inhibition	Notice of	Ryan S. Reed
Fort Worth	Inhibition	Notice of	W. Ann Richards
Fort Worth	Inhibition	Notice of	Zeke L. Rogers
Fort Worth	Inhibition	Notice of	Stuart B. Smith
Fort Worth	Inhibition	Notice of	Micah Snell
Fort Worth	Inhibition	Notice of	Christopher C. Stainbrook
Fort Worth	Inhibition	Notice of	Mark Stockstill
Fort Worth	Inhibition	Notice of	S. Philip Swickard
Fort Worth	Inhibition	Notice of	Louis L. Tobola
Fort Worth	Inhibition	Notice of	Kerwin K. Wade
Fort Worth	Inhibition	Notice of	Nancy S. Weaver
Fort Worth	Inhibition	Notice of	Joshua Whitfield
Fort Worth	Inhibition	Notice of	J. Scott Wilson
Fort Worth	Inhibition	Notice of	Scott R. Wooten
Fort Worth	Removal	Upon of Renunciation of Ministry	Jack Leo Iker
Georgia	Release	from Ministry	Samuel Moore Logan
Georgia	Renunciation	of Ordained Ministry and Release	James Nortney Cox
Georgia	Renunciation	of Ordained Ministry and Release	Leigh Joseph Halliwell
Haiti	Inhibition	Notice of	Amirolad Lazard
Indianapolis	Suspension	Sentence of	Richard H. Winters
Iowa	Removal	Declaration of Removal	Darin Richard Lovelace
Kentucky	Inhibition	Notice of	Spencer Quick



<b>Diocese</b>	<b>Action</b>		<b>Name</b>
Kentucky	Removal	Upon Voluntary Renunciation of Ministry	Spencer Quick
Lexington	Renunciation	Notice of Voluntary	James E. Campbell
Lexington	Renunciation	Upon Voluntary Renunciation of Ministry	Robert W. Bosworth, Jr.
Maryland	Release	from obligations of Priest	J. Anthony Vidal
Massachusetts	Remission and Restoration	Notice of	Richard S. Signore
Massachusetts	Removal	Declaration of Removal and Release	John H. Potter
Massachusetts	Restoration	Notice of Remission and Restoration	Kevin R. Hackett, SSJE
Massachusetts	Suspension	upon Voluntary Submission to Discipline	Robert Bacon, Jr.
Minnesota	Deposition	Sentence of	Carmen Edwards
Montana	Renunciation	of Ordained Ministry and Declaration of Removal	Barton Kent Stevens
Nebraska	Inhibition	Notice of	Jonathan Thomas Ford
Nebraska	Release	from obligations of Priest	Robert Scheibelhofer
New Jersey	Renunciation	of Ordained Ministry and Release	Eugene Charles Rabe
New York	Deposition	Sentence of	Carter J. Gregory
New York	Deposition	Sentence of	Carlton C. Clarke
New York	Deposition	Upon Voluntary Renunciation of Ministry	Philip Carr-Harris
New York	Removal	from Ministry	Charles L. McClean, Jr.
North Carolina	Deposition	Sentence of	Willis H. Steinberg, Jr.
North Carolina	Inhibition	Notice of	Donald P. Roberts
North Carolina	Removal	Upon Voluntary Renunciation of Ministry	Jane Kiplinger Brock
Northern California	Inhibition	Notice of	James A. Wilson
Northern California	Restoration	of the Ministry	Alexander James Mackenzie
Northwestern Pennsylvania	Removal	Upon Renunciation of Ministry	Charlene Lauver
Oregon	Inhibition	Notice of	Gregory Scott Browning
Oregon	Removal	Upon Voluntary Renunciation of Ministry	Bryce McProud
Rhode Island	Deposition	Notice of	Ann Holmes Redding
Rhode Island	Deposition	Upon Voluntary Renunciation of Ministry	Jonathan J. Ostman
Rhode Island	Removal	Upon Voluntary Renunciation of Ministry	Susie Crowninshield
Rhode Island	Renunciation	Notice of Voluntary	Livingston T. Merchant
Rhode Island	Renunciation	Notice of Voluntary	Robert W. Field
Rio Grande	Inhibition	Notice of	Alfred A. Sawyer
Rio Grande	Inhibition	Notice of	Robert J. Tally
Rio Grande	Release	from obligations of Priest	Donald P. Morrill
Rio Grande	Release	from obligations of Priest	Cynthia S. Anderson
Rio Grande	Release	from obligations of Priest	Richard C. Milliorn
Rio Grande	Release	from obligations of Priest	Steven N. Tighe
Rio Grande	Release	from obligations of Priest	William S. Francis
Rio Grande	Release	from obligations of Priest	William C. Cobb
Rio Grande	Removal	from Ministry	Felix Clarence Orji
Rio Grande	Removal	from Ministry	Daphne Ann Orgeron
Rio Grande	Removal	from Ministry	Felix Clarence Orji
Rio Grande	Removal	from Ministry	Thomas Dandridge Aiken
Rio Grande	Removal	from Ministry	Frank H. Grubbs
Rio Grande	Removal	from Ministry	Frank H. Grubbs
Rio Grande	Removal	from Ministry	Alfred A. Sawyer
Rio Grande	Removal	from Ministry	A. Logan Craft
Rio Grande	Removal	from Ministry	Martha Madeline Cullom
San Diego	Deposition	Upon Renunciation of Ministry	Janet Lynne Robertson Westall
San Joaquin	Deposition	Notice of	Richard Warren Bowman
San Joaquin	Deposition	Notice of	Douglas Buchanan
San Joaquin	Deposition	Notice of	Douglas Folsom
San Joaquin	Deposition	Notice of	F. Earle Fox
San Joaquin	Deposition	Notice of	Michael Fry
San Joaquin	Deposition	Notice of	Dennis Kelly

<b>Diocese</b>	<b>Action</b>	<b>Name</b>
San Joaquin	Deposition	Notice of Charles Otis Kendall
San Joaquin	Deposition	Notice of Marilyn Lea Church Kendall
San Joaquin	Deposition	Notice of Thomas Ray Upton
San Joaquin	Deposition	Sentence of Judith R. Battershell
San Joaquin	Deposition	Sentence of David Alan Brown
San Joaquin	Deposition	Sentence of Madeline Durrett Burton
San Joaquin	Deposition	Sentence of Wesley James Clare
San Joaquin	Deposition	Sentence of Donald J. Cleave
San Joaquin	Deposition	Sentence of John Chilson Combs
San Joaquin	Deposition	Sentence of Dale Jackson Cox
San Joaquin	Deposition	Sentence of Carl E. Dietze
San Joaquin	Deposition	Sentence of William Richard Eastman
San Joaquin	Deposition	Sentence of Jack Alexander Estes
San Joaquin	Deposition	Sentence of Jack Dwayne Faucett
San Joaquin	Deposition	Sentence of David Mallery Foster
San Joaquin	Deposition	Sentence of Thomas Mallery Foster
San Joaquin	Deposition	Sentence of William E. Gandenberger
San Joaquin	Deposition	Sentence of Erin Christianson Giles
San Joaquin	Deposition	Sentence of Howard Roden Giles, II
San Joaquin	Deposition	Sentence of Laurel Julliette Greene
San Joaquin	Deposition	Sentence of Woodrow Canieso Gubuan
San Joaquin	Deposition	Sentence of Robert George Hilliard
San Joaquin	Deposition	Sentence of Richard Ian James
San Joaquin	Deposition	Sentence of Blandford B. Jones, II
San Joaquin	Deposition	Sentence of Jinkun Michael Jun
San Joaquin	Deposition	Sentence of Gordon M. Kamai
San Joaquin	Deposition	Sentence of Linda Marie Klug
San Joaquin	Deposition	Sentence of Wolfgang Eugene Krismantis
San Joaquin	Deposition	Sentence of Cathy Marie Fresbie Leach
San Joaquin	Deposition	Sentence of Thomas Lawrence Maggitti
San Joaquin	Deposition	Sentence of Robert Victor Latour
San Joaquin	Deposition	Sentence of Frances Genevieve Levy
San Joaquin	Deposition	Sentence of Bertha Jean Rodriquez Marker
San Joaquin	Deposition	Sentence of Van Austin McCalister, II
San Joaquin	Deposition	Sentence of Michael Donald McClenaghan
San Joaquin	Deposition	Sentence of Arlen Glen Neckels
San Joaquin	Deposition	Sentence of Stephen George Nicholls
San Joaquin	Deposition	Sentence of Ronald James Parry
San Joaquin	Deposition	Sentence of Tancredo Ribubuet Pastores, Jr.
San Joaquin	Deposition	Sentence of Carlos Lee Raines
San Joaquin	Deposition	Sentence of Kenneth D. Richards
San Joaquin	Deposition	Sentence of Robert R. Richard
San Joaquin	Deposition	Sentence of Norman John Riebe
San Joaquin	Deposition	Sentence of Roger Dirk Riggsby
San Joaquin	Deposition	Sentence of Jerry Dean Roberts
San Joaquin	Deposition	Sentence of Donald Austin Seeks
San Joaquin	Deposition	Sentence of James Langley Snell
San Joaquin	Deposition	Sentence of Kay Winifred Sprague
San Joaquin	Deposition	Sentence of James L. Stout
San Joaquin	Deposition	Sentence of Mary Gwathmey Swann
San Joaquin	Deposition	Sentence of Charles Richard Threewit
San Joaquin	Deposition	Sentence of Robert Ward Tobias
San Joaquin	Deposition	Sentence of John-Paul Wadlin
San Joaquin	Deposition	Sentence of Andrew Edward Watson

<b>Diocese</b>	<b>Action</b>		<b>Name</b>
San Joaquin	Deposition	Sentence of	Jane Reeves Futrell Williams
San Joaquin	Inhibition	Notice of	Judith R. Battershell
San Joaquin	Inhibition	Notice of	David Alan Brown
San Joaquin	Inhibition	Notice of	Madeline Durrett Burton
San Joaquin	Inhibition	Notice of	Wesley James Clare
San Joaquin	Inhibition	Notice of	Donald J. Cleave
San Joaquin	Inhibition	Notice of	John Chilson Combs
San Joaquin	Inhibition	Notice of	Dale Jackson Cox
San Joaquin	Inhibition	Notice of	Carl E. Dietze
San Joaquin	Inhibition	Notice of	William Richard Eastman
San Joaquin	Inhibition	Notice of	Jack Alexander Estes
San Joaquin	Inhibition	Notice of	Jack Dwayne Faucett
San Joaquin	Inhibition	Notice of	David Mallery Foster
San Joaquin	Inhibition	Notice of	Thomas Mallery Foster
San Joaquin	Inhibition	Notice of	William E. Gandenberger
San Joaquin	Inhibition	Notice of	Erin Christianson Giles
San Joaquin	Inhibition	Notice of	Howard Roden Giles, II
San Joaquin	Inhibition	Notice of	Laurel Julliette Greene
San Joaquin	Inhibition	Notice of	Woodrow Canieso Gubuan
San Joaquin	Inhibition	Notice of	Robert George Hilliard
San Joaquin	Inhibition	Notice of	Richard Ian James
San Joaquin	Inhibition	Notice of	Blandford B. Jones, II
San Joaquin	Inhibition	Notice of	Michael Jun
San Joaquin	Inhibition	Notice of	Gordon M. Kamai
San Joaquin	Inhibition	Notice of	Linda Marie Klug
San Joaquin	Inhibition	Notice of	Wolfgang Eugene Krismantis
San Joaquin	Inhibition	Notice of	Robert Victor Latour
San Joaquin	Inhibition	Notice of	Cathy Marie Fresbie Leach
San Joaquin	Inhibition	Notice of	Frances Genevieve Levy
San Joaquin	Inhibition	Notice of	Thomas Lawrence Maggitti
San Joaquin	Inhibition	Notice of	Bertha Jean Rodriquez Marker
San Joaquin	Inhibition	Notice of	Van Austin McCalister, II
San Joaquin	Inhibition	Notice of	Michael Donald McClenaghan
San Joaquin	Inhibition	Notice of	Arlen Glen Neckels
San Joaquin	Inhibition	Notice of	Stephen George Nicholls
San Joaquin	Inhibition	Notice of	Ronald James Parry
San Joaquin	Inhibition	Notice of	Tancredo Ribubuet Pastores, Jr.
San Joaquin	Inhibition	Notice of	Carlos Lee Raines
San Joaquin	Inhibition	Notice of	Kenneth D. Richards
San Joaquin	Inhibition	Notice of	Robert E. Richard
San Joaquin	Inhibition	Notice of	Norman John Riebe
San Joaquin	Inhibition	Notice of	Roger Dirk Riggsby
San Joaquin	Inhibition	Notice of	Jerry Dean Roberts
San Joaquin	Inhibition	Notice of	Donald Austin Seeks
San Joaquin	Inhibition	Notice of	James Langley Snell
San Joaquin	Inhibition	Notice of	Kay Winifred Sprague
San Joaquin	Inhibition	Notice of	James L. Stout
San Joaquin	Inhibition	Notice of	Mary Gwathmey Swann
San Joaquin	Inhibition	Notice of	Charles Richard Threewit
San Joaquin	Inhibition	Notice of	Robert Ward Tobias
San Joaquin	Inhibition	Notice of	John-Paul Wadlin
San Joaquin	Inhibition	Notice of	Andrew Edward Watson
San Joaquin	Inhibition	Notice of	Jane Reeves Futrell Williams
San Joaquin	Inhibition	Notice of	Richard Warren Bowman

<b>Diocese</b>	<b>Action</b>		<b>Name</b>
San Joaquin	Inhibition	Notice of	Charles Otis Kendall
San Joaquin	Inhibition	Notice of	Douglas Buchanan
San Joaquin	Inhibition	Notice of	F. Earle Fox
San Joaquin	Inhibition	Notice of	Thomas Ray Upton
San Joaquin	Inhibition	Notice of	Marilyn Lea Church Kendall
San Joaquin	Inhibition	Notice of	Dennis Kelly
San Joaquin	Inhibition	Notice of	Douglas Folsom
San Joaquin	Inhibition	Notice of	Michael Fry
San Joaquin	Removal	Upon Renunciation of Ministry	Johnny Russell Johnson, Jr.
South Carolina	Removal	Declaration of and Release	Michael P. Szymanowski
Spokane	Inhibition	Notice of Temporary	Arthur Robert Thomas, Jr.
Spokane	Suspension	Notice of	Arthur Robert Thomas, Jr.
Tennessee	Remission and Termination of Suspension	Notice of	Kienneth B. Swanson
Texas	Release	from Ministry	Stanly G. Gerber
Texas	Release	from Ministry	Craig Victor Heenan
Upper South Carolina	Deposition	Notice of	George Naff Gray, Jr.
Upper South Carolina	Removal	Upon Renunciation of Ministry	Leslie C. Barker
Upper South Carolina	Removal	Upon Renunciation of Ministry	Robert Mann Hartley
Virginia	Inhibition	Notice of	Margaret Phillips
Virginia	Removal	Notice of	Gary L. Way
Virginia	Removal	Notice of	Robert D. Koth
Virginia	Removal	Notice of	Jacquelyn Sue Hardman
Virginia	Removal	Notice of	Margaret E. Phillips
West Missouri	Remission of Deposition	Notice of	Roger A. Stinnett
West Texas	Release	Upon Voluntary Renunciation of Ministry	Kenneth Peck
Western Louisiana	Suspension	upon Voluntary Submission to Discipline	Don C. Leger
Western New York	Deposition	Notice of	John E. Commins
Western New York	Deposition	Notice of	Edward H. Kusmierczyk
Western New York	Deposition	Notice of	Richard Molison
Western New York	Deposition	Notice of	John A. Reitz
Western New York	Deposition	Notice of	Arthur W. Ward, Jr.
Western North Carolina	Deposition	Upon Voluntary Renunciation of Ministry	Scott E. Shumate
Western Oregon	Release	from Ministry	Scott Browning

**The Loans and  
Grants Committee  
of the Diocese  
of Ohio**

**Meetings:** 5/20/2009  
6/12/2009  
9/24/2009

*all meetings are held on an "as needed" basis.*

**Officers:** None

**Committee Members:**

Darrell Knapp, St. James, Painesville  
Ed Stevens, St. Paul's, Cleveland Heights  
The Rev. Dr. C. Eric Funston, St. Paul's, Medina  
Nancy-Anne Wargo, St. Timothy's, Macedonia  
Sandy Rockwell, St. Timothy's, Macedonia  
The Rev. David Bargetzi, Episcopal West Side Shared Ministry

1) The purpose of the Loans and Grants Committee of the Diocese of Ohio is to review capital loans and grants requests from parishes. Diocesan Council establishes guidelines for parishes to use in the application process, and the Council periodically reviews and updates these guidelines.

a) Actions taken during the year are as follows:

1. *Our Saviour, Salem – The parish applied for a grant in the amount of \$12,825 for repairs to a retaining wall in 2007. After careful consideration of the parish's financial status, the committee rejected the grant, citing lack of financial need.*
2. *St. Thomas, Berea – The parish applied for a grant in the amount of \$17,500 for various projects of the parish, including parking lot repair, ceiling fans and sidewalk near the Harkess Hall. The committee rejected the grant application, based on the projects not being considered urgent, and the parish's capacity to fund the projects from their own finances.*
3. *St. Stephen's, Steubenville – The parish applied for a grant of \$8,787 to replace gutters and repairs to the front door from water damage. The Committee approved the grant application. The work will be done in the spring of 2010.*
4. *St. James, Painesville – The parish applied for funds in the amount of \$40,593 to repair building damage and bring electrical work up to code. The need for these repairs was discovered when the organ was removed for restoration, and the work needs to be completed before the organ can be replaced. The Committee commended the rector, The Rev. Vanessa Clark, and the treasurer, Darrell Knapp, for the completeness of the application. Art Lindrose, a member of the parish who will supervise the construction, was also present. The parish conducted a capital campaign to pay for the organ restoration. The Committee felt that the St. James' Foundation could be relied upon for some financial support once the financial markets recovered. The Committee votes varied from full loan to full grant, and a consensus opinion was reached for a BLF Grant in the amount of \$28,093 and an EAF Loan in the amount of \$12,500 at 4.5% for 42 months.*

2) There is no budget for the committee. Meetings usually take place by e-mail or conference call.

## **Diocese of Ohio Commission on Ministry**

***Purpose Statement:***

*The purpose of the Commission on Ministry is to advise and assist the Bishop in the work of discernment, formation and support for persons in Holy Orders and Lay Professionals in the Diocese of Ohio.*

The Bishop is the chair of the COM, but he appoints a member of the COM to serve as the presiding chair in his absence. Eight clergy and eight laypersons are appointed by the Bishop to four year terms to the COM with two clergy and two laypersons being appointed each year at Diocesan Convention.

The work of the Commission on Ministry is carried out by seven committees. Membership on these committees is made up of COM members and other lay and ordained people from across the Diocese. All COM members are asked to serve on at least one committee, and COM members generally chair these committees.

*The current COM committees are:*

Vocational Discernment  
Committee on the Priesthood  
Committee on the Diaconate  
Clergy Households  
Grant Review and Compensation  
Lay Professionals  
Systemic Barriers

The Commission as a whole met six times since the 192<sup>nd</sup> convention: in December, January, March, May, September, and October.

Since the last Convention, the COM sponsored a Bishop's Advisory Committee on Applicants for the Ministry (BACAM) weekend in November of 2008, with one aspirant for Postulancy.

The COM conducted interviews with postulants and candidates for candidacy, the transitional diaconate, and the priesthood.

In February a Ministry Discernment Day was held for those discerning a call to ministry, at St. Thomas in Berea.

Seven Vocations Committees were formed following this, for applicants to the priesthood and the diaconate.

The COM also sponsored a Seminarian Gathering in March of 2009 at Cedar Hills. Candidacy and ordination interviews were held at the gathering, as were interviews with the Board of Examining Chaplains. Lee Irving returned for a third year to offer financial advice and counseling for seminarians.

There were five ordinations to the transitional diaconate, and one reception to the Episcopal priesthood at Trinity Cathedral in June. George Baum, Vincent Black, Jennifer Leider, David Nelson, were ordained in June to the diaconate, Daniel Knapp was received to the priesthood.

Other business of note that was carried out by the COM included reviewing and making recommendations to the bishop for the diocesan discernment process for receiving clergy from other churches in historic succession but not in communion with the Episcopal Church.

**VOCATIONAL DISCERNMENT COMMITTEE** is made up of laity and clergy from around the diocese, some of whom also serve on the COM, and some of whom do not. Through education and providing opportunities to listen for God's call, the committee serves to empower all people, especially laity, to be spiritual leaders. The Vocational Discernment Committee is responsible for developing and carrying out an annual Ministry Discernment Day (MDD). Those attended the MDD had an opportunity to engage in reflection with representatives from the diaconate and the priesthood, with lay professionals, and with the bishop. Several COM members attended the event as well.

**THE COMMITTEE ON THE PRIESTHOOD (COP)** met several times throughout the year, for the primary purpose of discerning how it could carry out the work of the COM in responding, along with the Congregational Development Commission, to the recommendations made by the Mission Strategy Task Force at the 191<sup>st</sup> Convention. Specifically, the COP continues to meet and explore ways to carry out the charge given in recommendation two, "to pursue additional options for priestly formation beyond the traditional residential seminary model in order to expand our capacity for ordained leadership across the diocese."

**COMMITTEE ON THE DIACONATE** met monthly reviewing the process and formation for the Diaconate. The group was involved in the Deacon Formation Blitz, and a deacons retreat.

**CLERGY HOUSEHOLDS** The committee put together the "Day at the Zoo" where clergy households were invited to come together at the Akron Zoo and share a meal as well as the excitement of the Zoo.

**GRANT REVIEW AND COMPENSATION** met regularly throughout the year. 11 people, both clergy and lay professionals, received continuing education grants since the last convention. The clergy compensation package for 2010 was proposed by the committee to the COM and approved by the COM at its September 2009 meeting. The Committee began the process of reviewing distribution of sabbatical funds.

**LAY PROFESSIONAL COMMITTEE** began with some success a lunch for church administrators. The group met for a simple bag lunch and time together. They invited the diocesan administrators to their June 9<sup>th</sup> meeting

**SYSTEMIC BARRIERS COMMITTEE** was formed in the summer of 2006. The role of the committee is to support clergy of color and cultural diversity. It is a joint committee of the Commission to End Racism and the COM. The Systemic Barriers Committee's initial task was to respond to a Resolution to Study Systemic Barriers to the Ordination Process, especially in relation to women and people of color. The committee concluded that in the Diocese of Ohio, there are few barriers to women, but we have very few people of color serving in the diocese. There remains much work to be done. As reported to the 191<sup>st</sup> convention, the chair of the Committee had to resign, and the Commission to End Racism had not been active. In order to continue their work, the Committee felt that they needed more leadership and diocesan staff support. The committee therefore has lost momentum in the past two years. The committee has regained some of that momentum this past year. The COM has renewed its commitment to working with the Commission to End Racism to study any systemic barriers that female clergy and clergy of color might encounter during the entire ordination process, from discernment through ordination to placement. The committee has developed a study process for this task. It is currently recruiting members for a steering committee that will conduct the study and summarize its findings.

The 2010 budget was approved by the COM at its May meeting, and submitted to Diocesan Council. It may be seen in the Convention Handbook.



## **Christian Formation Committee**

<b>Meetings:</b>	November	Cedar Hills, Painesville
	December	St. Paul's, Akron
	January	Trinity Cathedral, Cleveland
	February	Harcourt Parish, Gambier
	April	Epiphany, Euclid
	May	<i>Tuesday at 10</i> webcast
	June	Trinity, Findlay
	September	St Paul's, Akron

**Members:** The Rev. Helen Svoboda-Barber, Chair  
The Rev. Carol Evans, Secretary  
The Rev. Joy Caires  
Kate Gillooly  
Deacon Pete Nielsen  
Jim Miller  
The Rev. Kelly O'Connell  
The Rev. Marie Phillips  
Jerry Smith  
Sheila Svoboda  
Natalie Tallon

**Major Events of the Year:**

- Produced Bible Study Book Marks as diocesan-wide Lent offering
- Lead May Tuesdays at 10 on "Formation Outside the Box"
- Said goodbye to Brian Kirby, co-chair and Susan McDonald, diocesan staff liaison
- Continued distilling information gathered in 2008 survey

**Survey Results Action Plan:**

- Connect parishes that want information on specific programs with parishes that have used the programs (see survey results)
- Facilitate area gatherings of those involved with Christian Education
- Consider diocesan resources for Baptismal and Conformation programs

**Yearly Budget:** \$0

***Christian Formation Survey Results: A Partial List***

***Sacramental Preparation***

- Thirty parishes would like more information on baptismal preparation.
- Twenty-six parishes would like more information on confirmation preparation.

***Youth Ministry***

- Only six parishes have youth very active in the diocese.
- Another twenty-three parishes have youth who occasionally participate in the diocese.
- Seventeen parishes have ideas about how to improve youth ministry.

***College Ministry***

- Six parishes have college ministries.
- Thirteen parishes would like to begin college ministries.

***Adult Education***

- Ohio Parishes have been trained in over 14 types of Adult Education.
- There are 16 adult education programs that parishes would like more information about.
- We plan to connect parishes wanting information with parishes who have been trained in those programs.

***Formation in Action***

The following number of parishes are engaged in forming their members by engagement in the listed ministries:

30	Food banks and feeding ministries
19	Clothing collections
15	Mission trips
12	Ministry with the elderly
8	Environmental ministries
8	Housing ministry
9	Tutoring/mentoring

***Support and Training***

- Thirty-five parishes report that they would like to meet with other Christian Educators in their area.
- Thirty-three parishes report they would be likely to attend a Diocesan Leadership Training event.
- Thirty-two parishes report they would be likely to attend a Diocesan Spiritual Retreat.
- Twenty-eight parishes report they would be likely to attend Diocesan Training for Lay Ministers.

## **Episcopal Community Services**

**Meetings:** Five regular meetings, on the 2nd Monday, every other month Subcommittees met as needed in person or by conference call

**Officers:** The Rev. Evelyn Manzella, Chair  
Debra Sudy, Secretary

Episcopal Community Services helps in fundraising for the Bishops Annual Appeal throughout the Diocese and applies for Grants from outside organizations. We encourage grant applications from church sponsored and church supported community programs. We walk applicants through the grant process, review the grants, and award grants based on the amount of funding available. We make sight visits to funded programs. We oversee the grant process for the Church Home Services to seniors quarterly.

The budget comes from the Bishop's Annual Appeal and from grants. We received a combined \$340,614, down from \$387,198 in 2008. The grant requests we received were four times higher than the monies we had available to award. Priority was given to church based and community based ministries with strong parish support and involvement. Because of the high number of grant requests we used all of the grant money available in the annual grant cycle and held none of it back for emergency or emergent projects.

The following chart lists the ECS Grants and Church Home Grants awarded in the 2008--2009 year.

### **Episcopal Community Services 2008 - 2009 Grant Awards**

#### ***Children, Education, General Services***

<b><i>Program</i></b>	<b><i>Agency</i></b>	<b><i>City</i></b>	<b><i>Grant</i></b>
After School Prevention Resources	Support to at Risk Teens (Start)	Cleveland	\$4,962
Beatitude House	The Potter's Wheel	Youngstown	\$1,654
Cedar Hills Scholarship Fund	Cedar Hills Camp/Conference Center	Painesville	\$4,135
CIRCLES	United Way of Wayne and Holmes	Wooster	\$8,057
Coalition of Quality Education	Toledo Area Ministries	Toledo	\$1,000
Cooperative Christian Services of Galion	Cooperative Christian Services of Galion	Galion	\$2,067
Daybreak Youth Crisis Center	Family Service Agency	Youngstown	\$3,308
Education Outreach to Homeless Children	Help Hotline Crisis Center, Inc.	Youngstown	\$3,308
Grace Day Care	Grace Episcopal Church,	Willoughby	\$750
The Green House Domestic Violence Center	WomanSafe	Chardon	\$1,500
Interdenominational Youth Coalition	Volunteer Services Agency, Inc.	Youngstown	\$2,481
Joint Neighborhood String Education Project	St. Paul's Episcopal Church	Canton	\$2,067
Kairos Prison Ministry of Ohio	Christ Church	Huron	\$3,308
Mentor/Entrepreneur Program	Episcopal West Side Shared Ministry	Cleveland	\$1,861
Open Doors, Inc.	St. Paul's Episcopal Church	Cleveland Heights	\$4,962
St. Andrew's Enrichment Program	St. Andrew's Episcopal Church	Cleveland	\$1,500
<b>Total</b>			<b>\$46,920</b>

### Youth Summer Grants

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
2008 Vacation Bible School	St. Paul's Episcopal Church	Medina	\$500
Appalachia Summer Mission Project	St. Andrew's Episcopal Church	Toledo	\$500
Appalachia Summer Mission Project	St. Mark's Episcopal Church	Toledo	\$500
Fishing for Others	St. Paul's Episcopal Church	Bellevue	\$500
St. Andrew's Enrichment Program	St. Andrew's Episcopal Church	Cleveland	\$500
Pre and Post VBS Discipleship	Christ Episcopal Church	Geneva	\$500
"Youth Building Together" Mission Project	Christ Episcopal Church	Kent	\$500
"Youth Building Together" Mission Project	Grace Episcopal Church	Ravenna	\$500
"Youth Building Together" Mission Project	St. Andrew's Episcopal Church	Akron	\$500
"Youth Building Together" Mission Project	St. John's Episcopal Church	Cuyahoga Falls	\$500
<b>Total</b>			<b>\$5,000</b>

### Housing, Homeless, Legal Services

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
Blanket Toledo with Love	Trinity Episcopal Church	Toledo	\$3,721
FOCUS: Family Outreach Community United Services	St. Mark's Episcopal Church	Toledo	\$7,443
Friends of the Homeless of Tuscarawas County	Trinity Episcopal Church	New Philadelphia	\$10,539
Going Home/Staying Home	Interfaith Hospitality Network	Akron	\$4,962
Greater Youngstown Point Homeless Drop-In Center	The Greater Youngstown Point, Inc.	Youngstown	\$1,654
Grace Church Jubilee Fund	Grace Episcopal Church	Ravenna	\$1,654
Homeless Family Day Centers Project	Interfaith Hospitality Network	Cleveland	\$4,962
2100 Lakeside Men's Shelter Episcopal Volunteers	Lutheran Metropolitan Ministry/2100	Cleveland	\$2,481
Independent Affordable Housing Program	Lutheran Metropolitan Ministry/2100	Cleveland	\$4,135
Sarah's House Transitional Housing Assistance	Sarah's Friends, Inc.	Bryan	\$2,894
Women's Re-Entry Network	Lutheran Metropolitan Ministries	Cleveland	\$4,548
<b>Total</b>			<b>\$48,993</b>

### Hunger

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
A Place at the Table	Trinity Cathedral	Cleveland	\$11,780
Community Hot Meals Program	Church of the Redeemer	Lorain	\$1,654
Community Meal/Follow the Son	St. John the Evangelist's Church	Napoleon	\$1,654
Feed Your Neighbor	Toledo Area Ministries	Toledo	\$3,308
Good Samaritan Hunger Center	Good Samaritan Hunger Center, Inc.	Akron	\$2,481
Grace Parish Food Pantry	Grace Episcopal Church	Mansfield	\$7,029
Heather Campbell-Reich Community Meals	St. Andrew's Episcopal Church	Elyria	\$2,481
Lakewood Christian Service Center	Lakewood Christian Service Center, Inc.	Lakewood	\$4,548
Oberlin Weekday Hot Meals	Christ Episcopal Church	Oberlin	\$1,654
St. Andrew's Food Pantry	St. Andrew's Episcopal Church	Elyria	\$2,481
St. James Lunch Program	St. James Episcopal Church	Painesville	\$3,308
St. Mark's Community Meals	St. Mark's Episcopal Church	Toledo	\$2,481
St. Paul's Episcopal Church Sunday Suppers	St. Paul's Episcopal Church	Mt. Vernon	\$3,308
St. Paul's Free Farmer Market	St. Paul's Episcopal Church	Medina	\$3,721
St. Paul's Food Pantry	St. Paul's Church	Marion	\$3,308
<b>Total</b>			<b>\$55,196</b>

### Health

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
EMPAC (Emergency Pregnancy Aid Contact)	Emergency Pregnancy Aid Contact	Mansfield	\$1,654
Healthcare Service to the Uninsured	Viola Startzman Free Clinic	Wooster	\$7,443
Teen Moms	Christ Church	Geneva	\$3,308
<b>Total</b>			<b>\$12,405</b>
<b>EPISCOPAL COMMUNITY SERVICES GRANTS TOTAL:</b>			<b>\$168,514</b>

<b>The Church Home: 2008 Services to Seniors Grants</b>			
<i><b>Program</b></i>	<i><b>Agency</b></i>	<i><b>City</b></i>	<i><b>Grant</b></i>
A Place at the Table	Trinity Cathedral	Cleveland	\$5,000
All Faiths Pantry	All Faiths Pantry	Cleveland	\$11,000
Brown Bag Concert Series	M&PA and Trinity Cathedral, Inc.	Cleveland	\$8,500
Emergency Meals for Homebound Seniors	Lake County Council on Aging	Mentor	\$1,500
Famicos Senior Services	Famicos Foundation	Cleveland	\$8,000
Homemaker Supportive Services	Oberlin Senior Center	Oberlin	\$9,000
Interfaith Home Maintenance Service	Interfaith Home Maintenance Service	Youngstown	\$25,000
Managed Care Advocacy Program	Toledo Area Ministries	Toledo	\$12,500
OPEN M's Free Clinic	OPEN M, Inc.	Akron	\$25,000
Paul's Peers Respite Care	St. Paul's Episcopal Church	Maumee	\$15,000
Portage County Medication Access Program	Family and Community Services, Inc.	Ravenna	\$12,500
SCOPE Harbor Adult Day Care	SCOPE, Inc. of Trumbull County	Warren	\$15,000
Senior Hotline (Senior Services)	Help Hotline Crisis Center	Youngstown	\$10,000
Senior Outreach Program	Barberton Area Community Ministries	Barberton	\$3,000
STAR Program	St. Thomas Church	Berea	\$3,100
Valley Parish Nurse Ministry	Valley Parish Nurse Ministry, Inc.	East Liverpool	\$2,000
Volunteer Service to Seniors	Volunteer Services Agency, Inc.	Youngstown	\$6,000
<b>THE CHURCH HOME GRANTS TOTAL:</b>			<b>\$172,100</b>
<b>TOTAL GRANT AWARDS: \$340,614</b>			

## Cedar Hills Camp and Conference Center

**Meetings:** Fiduciary responsibility is accomplished through direct monthly reporting to the Diocesan Treasurers Office, as well as, attending regularly scheduled meeting of the Diocesan Council.

**Officers:** The Rev. Peter W. Nielsen, III, Executive Director, reporting directly to the Office of the Bishop, the Diocese of Ohio

This past year, Cedar Hills continued to offer both hospitality and program on behalf of the diocese for nine months of the year. Operations were stopped in the hard winter months to contain high overhead costs when historically there had been lower revenues generated from operations. This operating model offered time for staff vacation, indoor maintenance that is difficult while entertaining guests, program planning and limited marketing of the months mid-February through mid-November.

In the recent economic downturn, the ministry of hospitality has been difficult to predict. We have had many cancellations of groups that were long-term users of Cedar Hills as they lost funding. We have also experienced quite a few new groups that now find Cedar Hills an affordable option that in the past went to “upper end” facilities. In the end, I believe we will end 2009 with little to no deficit, as we have been able to minimize operating costs to accommodate these operational shifts.

Several weekend retreat opportunities were offered throughout the year; however, the largest program offering remains Camp Cedar Hills. In a year where other camps were losing between 10 to 30%, Cedar Hills had three less campers than the previous season representing a 1% loss.

The annual operating budget for Cedar Hills in 2009 was \$343,391. Of this amount, \$152,000 was support from the operating budget of the Diocese of Ohio to the Cedar Hills operation with the balance coming from fees, fundraising, and earned income on invested funds. The diocesan investment was \$.44 toward every \$1.00 of ministry and included: the maintenance, upkeep and improvement of our 191 acre property with 10 buildings and infrastructure, program support for Camp Cedar Hills and the staff consisting of one full-time person, several on-call persons associated with direct service, contractors for maintenance and repairs and the seasonal summer camp program staff. In 2010, Diocesan support has been cut by \$30,000. The center’s operating budget, as well as the earning capacity of invested funds, has both been adjusted to accommodate this decrease in diocesan support. Along with marketing, program design and implementation, financial oversight and administration, the director of the center continues to function doing much of the direct service for guests, program and property maintenance, negotiating on-call help and contractors when needed.

This year it is important to note that the Diocesan Council, and Office of the Bishop, has engaged a task force to discover the nature of camp and conference ministries in the life and mission of the Diocese of Ohio. This research and discovery will certainly have an impact on the future ministry of Cedar Hills. I suspect their work will affirm some past initiatives, identify new opportunities for mission, and help us discern the future use of the asset we have at Cedar Hills.

Respectfully submitted,

The Rev. Peter W. Nielsen, III  
Executive Director, Cedar Hills

## **The Hunger & Homelessness Task Force of the Diocese of Ohio**

The 190<sup>th</sup> Convention of the Diocese of Ohio called for the establishment of a Task Force on hunger and homelessness. Bishop Mark Hollingsworth, Jr. appointed the Rev. Peter Nielsen and Janet Smart co-chairs. Deacons and lay members were also appointed.

When the Task Force began meeting, they invited representatives from various agencies and programs who were currently working on these issues to speak to them. Data was collected on the seriousness of these problems. This information has been shared through our website, mailings to parishes and our reports to the 191<sup>st</sup> and 192<sup>nd</sup> Conventions. In addition, experiential hands-on learning activities were conducted at 2100 Lakeside Men's Shelter in Cleveland (Lutheran Metropolitan Ministries) and at OPEN M in Akron at their mountain of food giveaway. Several of our members offered workshops at the Mission and Ministry Conference and the Winter Convocation on the topics of hunger and homelessness to increase awareness of these problems.

The Diocesan Mission Inventory compiled by the Commission for Global and Domestic Mission has been most helpful in directing parishes to possible projects and in providing contacts for them so they might work collaboratively. It is an excellent reference tool and showed that many of our parishes are already involved in Hunger and Homeless outreach projects. Our 2-cents-a-meal materials have been reworked and distributed to parishes both at Convention and through the mail. Over \$9,000 was sent to Hunger Network in Ohio to support advocacy work at the state level in 2008.

As we worked on hunger and homeless problems, we soon discovered that the 2-pronged task was overwhelming and really needs to be addressed by two separate groups in the future.

Our RECOMMENDATIONS for the future:

- 1)** Include deacons in the process through the Mission Office (The Rev. Mark Robinson)—they can lead the laity, but we are all called to be ministers;
- 2)** Offer support to parishes already involved in food and shelter projects by helping to link them to community resources they may not be using (ex. food banks);
- 3)** Advocacy is extremely important—a social justice coordinator is needed;
- 4)** Encourage more involvement from the Youth (Canon for Christian Formation: The Rev. Vincent Black);
- 5)** More interaction between committees and commissions is needed—perhaps chairs should meet quarterly so the “right hand knows what the left hand is doing;”
- 6)** Encourage more communication at all levels understanding that we need to help facilitate collaborative programs that respond to hunger and homeless issues. On-site visits from a Diocesan representative or two can offer support and affirmation of local and regional programs;
- 7)** A member of the Diocesan Council in coordination with our representatives and lobbyists at the local and state government levels should represent the Diocese to raise awareness of all issues relating to homelessness.
- 8)** Continue to offer annual regional workshops to support parish-level hunger and homelessness work;
- 9)** Generate Hunger and Homelessness advocacy speakers;
- 10)** Consider budgetary support in the amount of \$15,000 for hunger and homelessness work in 2011.

# **Appendix III**

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## **Resolutions and Amendments as Adopted**



## **R1: Resolution on Clergy Compensation for 2010**

### **Submitted by**

The Commission on Ministry

**Resolved**, that the minimum standard of full-time pension-based compensation (cash salary, utilities, housing, and Social Security tax reimbursement) for clergy serving congregations in the Diocese of Ohio during 2010 be established as follows:

- *At least \$45,000 for assisting clergy ordained less than three years;*
- *At least \$48,500 for clergy ordained less than three years, who are in charge of congregations and assisting clergy ordained more than three years;*
- *At least \$55,000 for clergy in charge of congregations with an annual Normal Operating Income (NOI) of no more than \$180,000;*
- *At least \$55,000 + 10% of NOI greater than \$180,000 up to \$360,000, for clergy in charge of congregations with an annual NOI greater than \$180,000;*
- *At least \$73,000 for clergy in charge of congregations with NOI greater than \$360,000; and be it further*

**Resolved**, that in addition to the above minimum standard, it is understood that each employer of clergy in the Diocese of Ohio shall:

- Make pension assessment payments as the Church Pension Fund shall determine;
- At minimum, provide to clergy and eligible dependents full funding for the least expensive medical insurance plan offered through the diocese in the area where the clergy person resides, or an amount equivalent to cost of the least expensive plan offered through the diocese toward a more expensive option. If the parish offers medical insurance coverage directly, and not through the diocese, the benefits must equal those provided by the least expensive plan available through the diocese.
- Provide appropriate reimbursement for expenses incurred in the course of fulfilling the responsibilities of the position, including the actual cost of the use of a personal automobile;
- Allow no fewer than four weeks of paid vacation annually;
- Allow annual professional education/development leave, of no fewer than two weeks, with a minimum allowance of \$750, and be it further

**Resolved**, that each employer of clergy in the Diocese of Ohio be encouraged to:

Offer additional benefits either fully funded, or on a pre-tax salary reduction basis (e.g., dental insurance, reimbursement for routine dental care, annual medical examination, child-care allowance, etc.);

- provide for sabbatical and parental leave; and be it finally

**Resolved**, that the provisions of this resolution be applied on a pro-rata basis to the minimum compensation and benefits related to positions that are less than full-time and more than one-quarter time.

### **Rationale**

Title II, Canon 8, of the Canons of the Diocese of Ohio directs the Annual Convention to establish a minimum standard of compensation for clergy employed in the diocese. The minimum standard for 2010 proposes no adjustment from the minimums established by the 192<sup>nd</sup> Annual Convention for 2009; the provision of a new category, viz., assisting clergy ordained less than three years, is retained. The 183<sup>rd</sup> Annual Convention of the Diocese of Ohio set a goal of raising the median clergy compensation in the diocese to the median level for the Episcopal Church as a whole. In 2006 the diocese ranked 36<sup>th</sup> of 100 dioceses in median clergy compensation. In 2006 the diocese also had, for the first time since the Commission on Ministry undertook this comparison, the highest median compensation among the contiguous dioceses of Ohio, Southern Ohio, Michigan, and Indianapolis.

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## **R2: Special Resolution of the Committee on Constitution and Canons**

**Submitted by**

The Committee on Constitution and Canons

**Resolved**, that this 193<sup>rd</sup> Convention acknowledge the end of the ministries of St. Andrew's, Canfield; Grace, Galion; and Trinity, Bryan. The Convention expresses its deep appreciation to the laity and clergy of these congregations for their years of faithful service to God and the people of their communities; and be it further

**Resolved**, that this Convention accepts this report of the Constitution and Canons Committee, in accordance with Title II. Canon 7, and declares St. Andrew's, Canfield; Grace, Galion; and Trinity, Bryan, to be extinct.

## **R3: Resolution on Lifelong Christian Formation**

**Resolved**, that this 193<sup>rd</sup> Diocesan Convention of the Diocese of Ohio affirm the action of the 76<sup>th</sup> General Convention in adopting the Charter for Lifelong Christian Formation, Resolution A082 and be it further,

**Resolved**, that we urge each parish to read and study the Charter and to live it out locally and be it further,

**Resolved**, we urge the Office of Christian Formation for All and the Christian Formation Commission to engage this Charter as a tool to advance the support for persons in their lifelong faith journey.

**Submitted by:**

The Christian Formation Commission of the Diocese of Ohio.

**Rationale:**

See attached General Convention Resolution for the Charter for Lifelong Christian Formation

**Resolution A082: Resolution for the Charter for Lifelong Christian Formation**

**Resolved**, the House of Bishops concurring, that the 76<sup>th</sup> General Convention of The Episcopal Church adopt the following text as The Charter for Lifelong Christian Formation:

Lifelong Christian Faith Formation in The Episcopal Church is lifelong growth in the knowledge, service and love of God as followers of Christ and is informed by Scripture, Tradition and Reason.

I have called you friends... John 15:14-16

Through The Episcopal Church, God invites all people:

- To enter into a prayerful life of worship, continuous learning, intentional outreach, advocacy and service.
- To hear the Word of God through scripture, to honor church teachings and continually to embrace the joy of Baptism and Eucharist, spreading the Good News of the risen Christ and ministering to all.
- To respond to the needs of our constantly changing communities, as Jesus calls us, in ways that reflect our diversity and cultures as we seek, wonder and discover together.
- To hear what the Spirit is saying to God's people, placing ourselves in the stories of our faith, thereby empowering us to proclaim the Gospel message.

...You did not choose me, but I chose you and appointed you to go and bear fruit... John 15:16

Through The Episcopal Church, God inspires all people:

- To experience Anglican liturgy, which draws us closer to God, helps us discern God's will and encourages us to share our faith journeys.
- To study Scripture, mindful of the context of our societies and cultures, calling us to seek truth anew while remaining fully present in the community of faith.
- To develop new learning experiences, equipping disciples for life in a world of secular challenges and carefully listening for the words of modern sages who embody the teachings of Christ.
- To prepare for a sustainable future by calling the community to become guardians of God's creation.

...I am giving you these commands that you may love one another... John 15:17

Through The Episcopal Church, God transforms all people:

- By doing the work Jesus Christ calls us to do, living into the reality that we are all created in the image of God and carrying out God's work of reconciliation, love, forgiveness, healing, justice and peace.
- By striving to be a loving and witnessing community, which faithfully confronts the tensions in the church and the world as we struggle to live God's will.
- By seeking out diverse and expansive ways to empower prophetic action, evangelism, advocacy and collaboration in our contemporary global context.
- By holding all accountable to lift every voice in order to reconcile oppressed and oppressor to the love of God in Jesus Christ our Lord; and be it further

**Resolved**, that we affirm that Christian Faith Formation in The Episcopal Church is a lifelong journey with Christ, in Christ and to Christ; And be it further

**Resolved**, that

1. We urge each diocese to read and study the Charter for Lifelong Christian Formation and to live it out locally.
2. We urge the seminaries and other institutions concerned with formation and education and leadership in The Episcopal Church, to engage the charter as a tool to advance their support for persons in their Christian Formation.
3. We urge The Episcopal Church's Evangelism and Congregational Life Center to commit staff during this triennium to communicate, advocate and implement the charter, and report progress to the Standing Commission on Lifelong Christian Formation and Education before the 77<sup>th</sup> General Convention.

And be it further

**Resolved**, that the 76<sup>th</sup> General Convention request that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$30,000 for the implementation of this Resolution during the 2010–2012 triennium.

### **Explanation**

Definition: Christian formation is the lifelong process of growing in relationship with God, self, others and all creation. In this process we are transformed into the people God wants us to be. As twenty first century Episcopalians, we still long for the inheritance common to all Christians in all times and places to be united in Christ, who calls us in the power of the Holy Spirit to love the Lord our God with all our heart, mind, soul and bodies; to love our neighbors as ourselves; and to make disciples, baptize and teach. In our Baptismal Covenant, The Episcopal Church has gracefully articulated the way in which we answer Christ's call. Life-long Christian Formation describes the many processes by which we live into that covenant.

By this definition, life-long Christian formation encompasses a broad set of activities, supported by a rich array of communities and institutions, serving people from cradle to grave. Without attempting to circumscribe the action of the Holy Spirit—who is always at work renewing the minds of Christian people—we acknowledge some common characteristics of formation ministries. Formation is unceasing-serving the individual's emerging understanding of identity, community, authority and purpose in Christ throughout their lives. Formation is dynamic-encompassing learning, action and reflection. Formation is formal and informal-informing, forming and transforming both the individual and the community. Formation is hospitable-welcoming the "new self, which is being renewed in knowledge according to the image of its creator." (Col 3:10)

**Problem:** As an institution, we have not entirely welcomed our Lord's generous invitation to grow in knowledge and love of him. Our behavior does not always reflect our heart's desire. For example, we have inadequately resourced our allocation of time, talent and treasures; we have failed to clearly articulate a vision and support for life-long Christian formation; and we have insufficiently supported Christian formation in our daily lives and work places. As a church, our people suffer from a wide-spread lack of knowledge of the traditions that form the foundation of The Episcopal Church. And moreover, in our post-Christian culture, Christian formation has been given significantly less priority than our other community activities. We have also experienced a failure to address the formational needs of an aging church membership. We need to address and remedy culturally exclusive teaching practices and the lack of attention to the formational needs of non-English speakers. We also need to continue our ever-growing response to stewardship of creation that merits our attention and resources.

**Vision for a transformed church:** We affirm that life-long Christian formation is foundational to the success of any church, and in the case of our own, is an integral part of the process by which we will rebuild The Episcopal Church. Our congregations will grow in numbers and health when they are supported by leaders-of all orders of ministry-who know their identity in Christ and are able to access their tradition for the purposes of proclaiming and living out the Gospel.

**By prioritizing the Christian formation ministries of The Episcopal Church, we choose to invest in a language and practice-rooted in scripture, tradition and reason-that has the capacity to unify us in fulfilling the Great Commandment. We can make use of this common language to inform, support and reinforce healthy relationships in families and congregations. With it we can continually develop and renew those processes, programs and rites of passage that develop Christian ministers at all ages and stages. Through it we can hold each other accountable to grow in love, knowledge and depth of insight.**

**History/How we preceded:** Early in 2007 PEALL recognized a need to be more intentional about bringing lifelong Christian formation to the attention of The Episcopal Church and encouraged a group of Diocesan Christian educators to draft a Case for a Proposed Charter for Lifelong Christian Formation to complement the Children's Charter. After receiving their case statement, which spoke about writing a new charter in 2012, PEALL and SCLCEF agreed not to wait for 2012 and called for a Charter Writing Team immediately to draft a document for presentation to the 2009 General Convention. With PEALL's support a Writing Group of educators, formation experts and others from a variety of disciplines (whose diversity included age, gender, ethnicity, church geography and congregational size) developed a draft Charter for Lifelong Christian Formation. The Writing Group submitted a draft charter to this Standing Commission that now advances Resolutions pertaining to a Charter for Lifelong Christian Formation.

## **R4: Resolution on Capital Punishment**

**Resolved**, that the 193<sup>rd</sup> Annual Convention of the Episcopal Diocese of Ohio call on the Governor and the legislature of the State of Ohio to adopt legislation imposing a moratorium on the use of capital punishment in the State of Ohio through sending copies of this resolution to the Governor and all members of the legislature whose districts lie with the Diocese of Ohio, and be it further

**Resolved**, that this Convention also encourage its constituent parishes to make petitions available for parishioners to sign which request our governor to grant clemency to individuals scheduled for execution in Ohio, and that these petitions be faxed to the governor, and be it further

**Resolved**, that this Convention encourage its constituent parishes to pray for the families and friends of murder victims and to invite their parishioners to understand and support the suffering friends and families of murder victims as they struggle to redeem this tragedy in their lives, and be it further

**Resolved**, that the Capital Punishment Working Group of the Episcopal Diocese of Ohio post on the diocesan web site one or more prayer vigil service formats for use by the congregations in our diocese, and also petitions for those scheduled for execution.

**Submitted by:**

The Diocesan Capital Punishment Working Group and other clergy and laity:

The Rev. Kirby P. Colwell, II	The Rev. James Brown
Constance Laessig	The Rev. Paul Gaston
P. Thomas Austin	Anne Pillot
Howard Parr	Dr. Gail Gatewood
Josh Butler	The Rev. Peter Nielsen, III
The Very Rev. Tracey Lind	The Rev. Barbara Maxwell
The Rev. Philip Anderson, MD	Louise Baker
Ted Wilson	Paul Baker
The Rev. Bryan Gillooly	The Rt. Rev. David Bowman
The Rev. Carol Duncan	The Rt. Rev. Arthur B. Williams, Jr.
Jan Wolf	The Rt. Rev. William D. Persell
The Rev. Polly Glanville	

**Rationale:**

The Episcopal Church has long opposed capital punishment, most recently at the 2000 General Convention. In the 1979 General Convention, the resolution stated that “the life of an individual is of infinite worth in the sight of Almighty God; and the taking of such a human life falls within the providence of Almighty God and not within the right of Man.” In 1960 and 1999 our Episcopal Diocese passed resolutions on capital punishment.

Use of the death penalty indulges feelings of anger and retribution, which continue the cycle of violence. We are not to take revenge or “repay anyone evil for evil” (Romans 12:17). Jesus has called us instead to love our enemies. As former Presiding Bishop Edmond L. Browning has said, “For the church, an eye for an eye has no place.”

The death penalty denies prisoners the opportunity for grace, repentance and forgiveness. Long-term incarceration, spiritual direction, and restorative justice can open the door to redemption and reconciliation. With the sentence of life without parole, society can be kept safe, and provide punishment for crimes.

A just society cannot wash its hands of responsibility even for the least among us. All people, no matter what their greatest sin might be, have value. God has given us the gift of life, and it is our respect for life, which makes us reject the idea that taking a life excuses or justifies the taking of another. It is because of this belief that we oppose capital punishment.

The Capital Punishment Working Group of the Episcopal Diocese of Ohio is one of several voluntary working groups in the diocese, which hold up social justice issues before the people of this diocese through education, ministry, and facilitating participation in changing unjust laws and policies.

## **R5: Resolution on Exploration of International Partnerships**

**Resolved**, that the 193<sup>rd</sup> Convention of the Diocese of Ohio affirms the work of the Bishop of Ohio and the Commission on Global and Domestic Mission (CGDM) in exploring potential international partnerships, and be it further,

**Resolved**, that this Convention ask the Bishop and the Commission on Global and Domestic Mission to pursue intentional and mutual partnerships with the Diocese of Tanga and the Diocese of Belize and report back to the 194<sup>th</sup> Convention for adopting any formal relationship with these dioceses.

**Submitted by:**

The Commission on Global and Domestic Mission

**Rationale:**

Based upon recommendations from the Diocesan Mission Strategy Task Force, the Diocesan Council adopted a resolution in May, 2008 that charged the Commission on Global and Domestic Mission with recommending to the 193<sup>rd</sup> Annual Convention two dioceses (one in Africa or Asia, and one in the Caribbean, South or Central America) with whom the Diocese might enter into an intentional covenantal partnership.

The CGDM met to discuss the nine potential relationships recommended to the Commission by members of the Commission and Diocese. The Commission evaluated each recommendation based upon the following criteria:

1. Existing or potential communication channels among partners
2. The partnership's capacity for mutuality or collaboration
3. Availability of in-country representatives to facilitate the partnership
4. Capacity of each side of the partnership to finance, support, and supervise visitors
5. The range of service opportunities for projects available both in country and in Ohio
6. Opportunities for the partnership to foster spiritual growth and cooperation for all involved.

In conclusion, the CGDM recommends two overseas global mission partnerships. The Commission selected the Diocese of Tanga and the Diocese of Belize with the hope that under the Bishop's direction we will be able to build upon already existing relationships between those entities and parishes within the Diocese of Ohio. The partnerships have two goals: 1) each parish of the Diocese of Ohio will have opportunities to participate in the partnerships in some manner and 2) activities and projects emerging from the partnerships will address the Millennium development Goals. The partnerships will be characterized by collaboration and opportunities to participate, which reflect the needs and resources of both participating dioceses.

This resolution does not establish a relationship, but if passed, expresses the Diocese's commitment to pursue the development of such a collaborative relationship. It authorizes the Bishop and Commission on Global and Domestic Mission to explore the feasibility and scope of such a relationship with their counterparts in the Diocese of Tanga and the Diocese of Belize and report back to next year's Convention on the steps taken to this end.



**Amendments to  
the Constitution  
and Canons of  
the Episcopal  
Diocese of Ohio  
as Adopted**

**First Amendment to the Canons**

The Current Title II. Canon 3: Of Deaneries is eliminated and is replaced by the following:

***Text of the Amendment:***

Title II. Canon 3: Of Mission Areas

Sec. 1. Congregations in the Diocese of Ohio shall be organized into eight Mission Areas by action of Diocesan Council. The areas shall be known as: Central East, Cuyahoga, North Central, Northeast, South Central, Summit, West, and Youngstown.

- (a) Mission areas shall be divided in order to assist in communication and the sharing of programs and resources, to provide mutual support among congregations, and to identify and implement opportunities for collaborative ministry. A Congregation may petition the Diocesan Council to be changed from one Mission Area to another Mission Area.
- (b) Two or more congregations within one Mission Area may form a voluntary Mission Partnership for the purpose of collaborative ministry.
- (c) Parishes in a shared ministry situated in two Mission Areas may form Mission Partnerships with parishes in either Mission Area.

Sec. 2. Each Mission Area shall form a Mission Area Council comprised of all active parochial clergy of the Mission Area and two laypersons from each parish. Each parish annually elects one representative, who is either a Vestry member or a Delegate to Annual Convention, and one representative, from the congregation at large, to serve on the Mission Area Council. Each Mission Area Council shall establish its own requirements for a quorum.

- (a) The Council shall elect four officers from its membership. The Council is led by a Chair (lay or ordained), Vice Chair (from the opposite order of the Chair), Treasurer, and Secretary. Each officer shall serve a one-year term and is eligible for reelection, provided that no individual shall serve more than three (3) years consecutively in any single office.
- (b) The Bishop shall appoint a Dean. The Dean serves as a liaison between the Bishop and Mission Area. She/He convenes the clergy of the Mission Area for fellowship and professional discussions. Pastorally, the Dean serves as a chaplain to the clergy of the Mission Area and the Mission Area Council. The Dean may not serve as either the Chair or Vice Chair. The Dean shall serve a three-year term.
- (c) The Mission Area Episcopal Church Women President shall serve as an ex-officio member of the Mission Area Council with seat and voice.

Sec. 3. The duties of the Mission Area Council include:

- (a) Provide leadership for the Mission Area, nurturing fellowship and collaboration among the parishes.
- (b) Meet at least quarterly, of which one meeting will be prior to Diocesan Convention for the purpose of discussing nominations, proposed constitutional and canonical changes, resolutions and the Diocesan Operating Budget.
- (c) Elect a member of the Mission Area Council to serve as a representative to Diocesan Council. The Diocesan Council representative is the liaison between the Diocesan and Mission Area Councils. She/He reports on Diocesan Council matters at each Mission Area Council meeting. If an individual's term on the Mission Area Council ends before her/his Diocesan Council term ends, she/he remains an ex-officio member of the Mission Area Council.
- (d) Support and encourage the development of Mission Partnerships.
- (e) When requested by funding sources, the Mission Area Council shall receive, discuss, and recommend grant applications.
- (f) Facilitate regional conversations among parishes concerning congregational planting, reorganization, and closing.

- (g) Recruit and recommend individuals to be considered when filling vacancies on diocesan commissions, committees, and leadership positions.
  - (h) Oversee the allocation and expenditure of all money designated for Mission Area usage.
- Sec. 4. Mission Areas or Mission Partnerships shall conduct their business affairs through one of their constituent parishes or by the creation of an independent not-for-profit corporation, which shall, in every case, comply with the provisions of the Canon "Of Business Methods in Church Affairs."
- Sec. 5. Mission Area Council Representatives to Diocesan Council.
- (a) Members of Diocesan Council elected as Deanery Representatives in 2007 or 2008 shall continue to serve as Mission Area Representatives until their terms on Diocesan Council conclude.
  - (b) Each Mission Area Council shall elect a single representative, lay or ordained, from its body to Diocesan Council at its Pre-Convention meeting. Such representatives shall serve for a term of three years and may not be reelected without a year's break in service.
  - (c) At the first Mission Area Council meeting in 2010, the Central East and Northeast Mission Area Councils will elect representatives to Diocesan Council whose term will begin immediately and conclude on November 30, 2012. Thereafter Mission Area representatives will be elected in the following rotation and their terms will begin on December 1 of the year they are elected:
    - 2010 – Summit, North Central, Youngstown
    - 2011 – Cuyahoga, South Central, West
    - 2012 – Central East, Northeast
  - (d) Mission Area representatives shall be responsible for reporting to Diocesan Council on the mission and ministry being carried out in their Mission Area, and for representing the interests of their Mission Area parishes in the affairs of the Diocese.
  - (e) No Mission Area representative to the Diocesan Council shall hold membership on the Standing Committee concurrently with a term of service on the Diocesan Council. Vacancies in office shall be filled by the Mission Area Council for the remainder of the unexpired term, and any person so chosen shall be eligible for re-election. The Mission Area representatives elected, when their terms have expired, shall be ineligible for re-appointment for the term next succeeding, and shall remain ineligible for service as members of the Diocesan Council for a period of one Convention year.

And in addition, the following amendments were adopted:

**Title I. Canon 7. Sec. 3**

Sec. 3. In addition to the above-named officers there shall be: (a) twelve members of the Diocesan Council elected at large in accordance with Section 4 of this canon, of whom six shall be members of the clergy canonically resident in the Diocese, and six members of the laity, adult communicants in good standing of the Church in the Diocese; and (b) such additional members as may be named in accordance with the Canon "of Mission Areas" and Section 5 of this Canon to represent the Mission Areas of the Diocese.

**Title I. Canon 7. Sec. 5**

**Sec. 5.**

- (a) Each Mission Area is entitled to elect a representative to the Diocesan Council. Such representative may be a layperson, a priest, or a deacon. Mission Area representatives shall be elected as specified in Title II. Canon 3. Section 5. to serve for a term of not more than three years.

**Proposer**

The Deanery Review Committee

**Rational of the Proposer**

In response to a recommendation from the Mission Strategy Task Force, the Diocesan Council passed a resolution authorizing the Bishop and Executive Committee of Diocesan Council to appoint a Dean-

ery Review Committee to research, develop, and propose a new model for collaborative mission and ministry among groups of local parishes. Diocesan Council requested a report from this Committee to be prepared for the 2009 Convention.

In response, 23 lay people and clergy, at least one from each of the existing Deaneries, have worked for the past year to review our current structure as well as models from other dioceses. We have discovered that with rare exceptions, initiatives in collaborative mission and ministry have not been successfully fostered through our current system, except for ECW and Clericus. We propose a new model for a suitable structure within the diocese, which will meet the aspirations of parishes and the Diocese to build working relationships for sustained productive collaborative ministry.

The proposed model will reduce the current ten regional deaneries of the Diocese into eight Mission Areas. These Mission Areas will be established along natural geographic divisions where possible, with a critical mass of congregations and clergy in each Mission Area. The shift from the name “Deanery” to “Mission Area” reflects both that the purpose of the proposed structure is to foster collaborative mission, and that the churches in that group share a collective responsibility to represent the Episcopal Church and serve the entire area within the boundary and not just their own local community.

Parishes will come together to form a Mission Area Councils. This Council will enable relationships to develop between congregations, will encourage collaborative ministry, and serve as a communication channel between the congregations and different Diocesan entities (e.g. Diocesan Council, Bishop’s Staff, Episcopal Community Services, etc.)

In addition, two or more congregations may form a voluntary Mission Partnership for the purpose of collaborative ministry. Congregations in a Mission Partnership will be eligible to apply for grant money that is specifically earmarked for support of such collaborative ministries.

The Deanery Review Committee proposes this new structure as a means for encouraging and facilitating collaborative ministry among congregations. The new structure has the potential to develop and improve communication at all levels of our common life that are necessary for us to be good stewards of our resources and faithfully minister in our contemporary context.

**Second Amendment to the Canons**

Replacement of the current Title I. Canon 14: Of the Diocesan Fund

***Text of the Amendment:***

Title I. Canon 14: Of the Diocesan Fund

Sec. 1. At each Annual Convention an assessment shall be made upon all parishes in the Diocese, according to the formula set forth in Section 2 of this Canon.

Sec. 2.

- (a) Beginning January 1, 2010, and in the calendar years thereafter, there shall be an annual assessment made upon all parishes in the Diocese as follows:
- 10 percent of the first \$50,000 of Normal Operating Expenses (NOE) of a parish;
  - 13 percent of that portion of the NOE above \$50,000 and up to \$150,000;
  - 16 percent of that portion of the NOE above \$150,000 and up to \$250,000;
  - 19 percent of that portion of the NOE above \$250,000.
- (b) Normal Operating Expenses is defined as "All Other Operating Expenses" (line #14) less "Assistance from diocese for operating budget" (line #7) in the Line-by-Line Instructions for the preparation of the 2008 Parochial Report as provided by the Episcopal Church.

Sec. 3.

- (a) By February 20, each parish shall estimate an annual assessment based on projected or budgeted Normal Operating Expenses for the current calendar year, and shall use that estimate to calculate an average annual percentage rate of assessment to be used as described in Section 3(b) below. The average annual percentage is determined by dividing the estimated annual assessment to the Diocese by the total estimated NOE of the parish for the year.
- (b) Beginning February 20, 2010 and on the 20th day of each month thereafter, each parish shall pay to the Diocese a monthly payment determined by applying the average annual percentage rate of assessment for the parish to the parish's Normal Operating Expenses for the preceding month.
- (c) No later than March 1, each year, each parish will determine its final assessment for the preceding year by performing an end-of-year reconciliation of its assessment due using the formula set forth in Section 2 above and the final Parochial Report data for the same year, to the total assessment payments made for the calendar year. Any overpayments may be applied to the parish's assessment for the following year and/or may be recorded as additional support of diocesan program at the discretion of the parish.

Sec. 4. Parishes in arrears on the day delegate certificates are canonically due shall retain seat and voice at following Diocesan Convention but forfeit their lay representation vote. Parishes are deemed in arrears when they fail to pay their Diocesan assessments in full for all months up to and including the last day of the fifth month prior to Diocesan Convention. There is no power entrusted to the Convention or any Committee thereof to waive this fault.

**Proposer**

The Assessment Review Committee

**Rationale of the Proposer**

**History**

- The current assessment process has been in effect since 1998.
- In 2006, Bishop Mark Hollingsworth requested a study of the assessment process. The result of this assessment was that the Diocese of Ohio assessment rates were in the middle range of assessment rates across the country. It was subsequently concluded that an overhaul of the assessment system was not deemed necessary at the time.
- Last year, at the 192<sup>nd</sup> Annual Convention of the Diocese of Ohio, two amendments to Title 1, Canon 14 were presented. After much discussion and debate the proposed changes were referred to an ad hoc Assessment Review Committee that was to perform a comprehensive review including, but not limited to,
  - The current funding mechanism for supporting the mission and ministry of the diocese

- The system of reporting and making payments
- Consequences for non-compliance with diocesan canons.

#### Funding Mechanism

- Currently a graduated rate system ranging from 10%-16% is applied to the Parish's Normal Operating Income (NOI) to determine the assessment due.
  - As the NOI, per the National Episcopal Church Parochial Report instructions, closely approximates the Parish's operating expenses it results in assessment being paid on funds used to support the diocese, used for outreach, in addition to funds used for the operations of the parish.
  - Because of the mechanics of calculating the NOI, it makes it difficult for many parishes to easily calculate and accurately estimate to determine their monthly assessment due.
  - Under the proposed new canon, the assessment calculation will be based on the Parish's Net Operating Expense (NOE). The NOE will not include funds spent for the Diocesan Assessment or local outreach expenses programs. Also excluded from the calculation is any diocesan assistance used to support a parish's operating budget.
  - The proposed canon also recognizes the need for any new method to have a "revenue neutral" impact to the Diocese. Therefore, in addition to changing the calculation base to NOE and exempting the Assessment payments to the Diocese, the new graduated rate table changes the range to 10%-19%.
  - Overall, the Assessment Committee believes that these changes simplify the monthly assessment calculation; simplify the year-end reconciliation; and reflect the diocese's commitment to outreach by not assessing a parish on funds used to support local outreach programs and the diocese.
  - If this proposed canon was in place for 2007 the impact for most parishes would be minimal. Most parishes will see a change in a range of +/- \$1,000 on their annual assessment.
- #### Reporting and Payment System
- The current canon requires that by February 20th of each year each parish make an estimate of the assessment rate used for year. Monthly, along with payment, an assessment worksheet is required to be completed. At the end of the year, annual assessment reconciliation is required to be completed.
  - The proposed canon does not include any substantive changes in the reporting and payment requirements. However, the Assessment Committee believes that changing the calculation base to NOE will greatly simplify the estimation, monthly payment calculation, and year-end reconciliation processes.

#### Consequences for Non-compliance

- The current canon provides that any parish reported as in arrears by the Treasurer of the Diocese shall not be entitled to any representation in any Convention of the Diocese.
- The current canon does not specifically define what qualifies as "in arrears." However, in practice, the Treasurer has considered in arrears as having outstanding assessment due more than 90 days from the date of the Convention. This has traditionally required payment through August of the year of the Annual Convention.
- The proposed canon relaxes the consequences for non-compliance. It is proposed that any parish in arrears will retain seat and voice but will still forfeit their lay representation vote.
- The proposed canon also specifically defines the parameters for being considered in arrears. This definition is also more generous than the current practice. It is proposed that parishes must be paid in full up to and including the fifth month prior to the Diocesan Convention, however this payment must be made by the due date for Delegate Certificate forms. The following are offered as examples:
  - For lay delegates to have the right to vote at an Annual Diocesan Convention in November, a parish must have paid all of its Diocesan assessments due, for all of January through June of the current year and all previous years, no later than 30 days prior to Convention.
  - For lay delegates to have the right to vote at a Special Diocesan Convention in February, a parish must have paid all of its Diocesan assessments due, for all of January through September of the preceding year and all previous years, no later than 30 days prior to Convention.

**First Amendment to the Constitution**

Amendment of Article V. Section 3 of the Constitution.

**Text of the Amendment**

Article V

Sec. 3 When required, the Convention shall elect clerical and lay deputies and provisional deputies to the General Convention, clerical and lay delegates to the Provincial Synod, a clerical and a lay member to the Cathedral Chapter, and clerical and lay members of the Diocesan Judicial Panel.

**Proposer**

The Rev. Alan James

**Rationale of the Proposer**

The Ohio Council of Churches changed its by-laws in October 2005, from having lay delegations represent participating judicatories to having the bishops, or in their absence an appointed member of their staff, represent the judicatory. This amendment brings the Diocesan Constitution into alignment with the Ohio Council of Churches' by-laws.

# **Appendix IV**

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## **2010 Program and Budget**

## **2010 Program and Budget**

### **Grow, Give, and Serve: Overview of the 2010 Diocesan Program and Budget**

The 2010 budget more fully incorporates the mission statement of the Diocese: to GROW in faith, numbers, and resources for mission, to GIVE sacrificially as a spiritual surrender of self to God, and to SERVE the world together as the risen body of Jesus Christ. These priorities were developed by the Program and Budget Committee and approved by Diocesan Council. The Diocesan Council also approved 13 resolutions to implement the Diocesan mission. These Mission Strategy Resolutions follow the mission statement.

#### **GROW in faith, numbers, and resources for mission**

- Provide resources for building community and establishing identity as Episcopalians in the Diocese of Ohio (this includes developing and expanding communication models for reaching out to both current Episcopalians and non-Episcopalians),
- Develop and employ creative models for congregational ministry—Comprehensive revitalization, Natural Church Development, Urban congregations, College Work, and provide support for parochial advertising
- Provide Christian formation opportunities and resources for children, youth and adults to grow in faith and understanding, recognizing that the spiritual journey is never ending.

#### **GIVE sacrificially as a spiritual surrender of self to God**

- Develop culture of giving through Annual Appeal, planned giving, gift development
- Invest in ministries of Service and Justice—commission for Global and Domestic Mission, Millennium Development Goals funding
- Encourage and assist congregational teaching in Giving as a spiritual discipline

#### **SERVE the world together as the risen body of Jesus Christ**

- Develop Domestic and Global Partnerships—i.e. companion dioceses, collaborative ministries between the Diocese of Ohio/Diocese of Southern Ohio, etc.
- Promote and support mission trips for all ages as a central part of spiritual formation and Life Long Learning.
- Inspire and form servant leaders—equipping people of all ages for ministry, lay and ordained.
- Form and deploy deacons in collaborative service.

#### **Mission Strategy Resolutions Resolution #1a**

The Bishop and Office for Christian Formation are authorized to appoint members to a new Christian Formation Commission. The CFC is responsible for providing oversight for Christian Formation Programs in the Diocese (children, youth, and adult). The Commission reports to the Diocesan Council and is supported by the work of the Christian Formation Office.

#### *Anticipated actions:*

1. Using a template created by the Christian Formation Office and CFC, each parish will be asked to present an inventory of its relevant programs
2. CFC will assess the gaps and needs (particularly in the areas of gifts discernment, sacrificial stewardship, servant leadership, lay leadership development, youth formation and leadership training, college work, and Cedar Hills summer camp), facilitate collaboration between parishes, and formally present its findings to Convention.

Projected Timing: Inventories to CFC by Convention 2008; CFC presentation at Convention 2009

#### **Resolution #1b**

Natural Church Development will be the primary church growth model used in the Diocese of Ohio through at least 2012. The Congregational Development Commission is tasked with developing an infrastructure by which the number of parishes utilizing NCD can grow by at least 12 parishes a year.



## **Resolution #2**

The Commission on Ministry is directed to consider and recommend to the Bishop additional models of priestly formation, beyond residential seminary model, that can be utilized within the Diocese of Ohio to ensure that we have a sufficient number of trained priests to serve the needs of the Diocese.

### *Anticipated actions:*

1. Research models within the Episcopal Church and the Anglican Communion
2. Identify potential options for use in our Diocese

Projected Timing: Pilot programs in place in 2011.

## **Resolution #3**

The Congregational Development Commission is charged with developing a model for facilitating Regional conversations among parishes concerning congregational reorganization and church closings. This model should result in a plan for allocating resources, assets, and parish ministries so that we are more faithful stewards and better able to build healthy communities wherever we are. This must be done in a way that is both revitalizing and pastorally sensitive for those who are grieving the transition and sense of loss.

### *Anticipated actions:*

1. Diagnostic tools must clarify parish circumstances and provide options for collaboration and reorganization (including ecumenical collaboration). Cases of successful transitions should be identified so that parish leaders might have access to those who have experienced and guided successful transitions inside or outside of the Diocese or in other denominations.
2. In the event that there is a mutual decision among concerned parties that a congregation must close, there needs to be an intentional regional discussion and process to assist parishioners and ministries with the transition into the life of another congregation in a pastorally sensitive manner.

Projected Timing: Diagnostic tools, case studies, and contacts by Convention 2009; application and revitalization as needed over the next decade.

## **Resolution #4**

The Bishop and Executive Committee of Diocesan Council are authorized to appoint a Deanery Review Committee for research, development, and implementation of a new model for collaborative mission and ministry between local parishes on a sub-diocesan level.

Projected Timing: Proposing a plan and canonical changes by 2009 Annual Convention and implementation by 2010 Annual Convention.

## **Resolution #5**

The Diocesan Council encourages and invites each parish in the Diocese to enter into at least one 3-year covenantal relationship with another parish within the Diocese of Ohio; their covenant will set forth how and with what expectations they will work together, and in what areas they intend to interact (e.g., worship, finances, clerical/lay leadership, fellowship, community building, service/mission efforts, Christian formation, small-group ministries).

### *Anticipated actions:*

1. The Bishop would facilitate discussions with clergy regarding the potential and need for intentional grassroots collaboration
2. Congregation Development Commission will facilitate parishes' conversations around previously identified and developed models of covenantal relationships and exchanges

Projected Timing: All parishes engaged in preliminary covenantal conversations by the 2008 Annual Convention; presentation of covenants and actions at 2009 Annual Convention.

**Resolution #6a**

The Diocesan Council calls upon the Bishop, Diocesan Staff, Commission and Committee Chairs to enable greater representative diversity in Diocesan committees and commissions through a) scheduling (times and locations), b) rotating the geographic locations of the Mission and Ministry Conference and Annual Convention around the Diocese, and c) establishing more immediate communication of Diocesan actions and opportunities through all communication channels (including Sunday worship).

**Resolution #6b**

The Diocesan Council charges the Diocesan Technology Committee to offer assistance in enabling greater representative diversity in Diocesan committees and commissions through the use of current technologies (audio/video conference, web-meetings).

**Resolution #7**

The Bishop and Diocesan Council Executive Committee are authorized to appoint a Diocesan Advocacy Committee.

*Anticipated Actions:*

1. The Bishop is asked to discuss with the Episcopal Community Services Foundation as to whether Diocesan Advocacy falls within their responsibility.
2. ECSF or the appointed Diocesan Advocacy Committee will assist in identifying a potential focus for advocacy and being a resource to parishes participating in diocesan advocacy.
3. The Bishop and Diocesan Council will then name a fundamental societal need that parishes can address individually and collectively to effect transformation and healing

Projected Timing: Annual review and recommitment beginning in 2008

**Resolution #8**

The Commission on Domestic and Global Mission, in consultation with the Bishop, is to recommend to the Bishop and Diocesan Council at least two potential dioceses outside the United States (one in Africa/Asia; one in Caribbean/South America/Central America), with whom we can enter into covenantal relationships. The covenants should build upon existing relationships and initiatives. These relationships should not exclude other international relationships by parishes or the Diocese but be opportunities for common ministry in which each parish in the Diocese is called to and can participate in some manner.

*Anticipated Actions:*

1. Review results of Mission Inventory as a basis for discerning where there is already a broad commitment to international mission work upon which we might explore establishing a covenantal relationship with the local diocese of a Province in the Anglican Communion.
2. Enter into conversation with leaders of dioceses with which we might enter into a covenantal relationship.

Timing: Approve and sign covenants by 2009 Annual Convention.

**Resolution #9**

By 2013, the Diocese will allocate at least 15% of the sum of the total operating budget and all diocesan non-operating funds not otherwise restricted from such projects for domestic and international mission and service projects. It shall be the responsibility of the Finance Committee of Diocesan Council to propose annually an amount of spending from the diocesan operating fund budget for domestic and international mission and service projects in order to move towards and meet this goal.

Timing: This plan is to be proposed for adoption at the 2008 Annual Convention and the first incremental increase evidenced in 2009 Diocesan Operating Budget.

**Resolution #10a**

The Congregational Development Commission, through a revitalized Evangelism Working Group, will create and offer throughout the Diocese a program of education for evangelism and invitation, designed to encourage our people to reflect on and share their own faith experience with those who are seeking God.

Timing: Report to 2008 Annual Convention.

**Resolution #10b**

The Congregational Development Commission is charged with designing a strategic plan for starting new congregations in places where we do not currently have active congregations, using new models of ministry-focused congregational organization as much as possible, and estimating as realistically as possible the resources that will be necessary to implement the plan.

Timing: Report to 2009 Annual Convention.

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The budget narratives which follow provide more detail on the specific priorities listed above.

As in prior years, the budget summary which follows presents only the “operating budget” of the diocese to the annual Convention for approval. The operating budget governs the money received from parish contributions and investment income that it will spend on regular diocesan ministry. The funds received and expended for other ministry areas, such as parish loans and grants, ECSF and Church Home, and activity of the Joint Investment Fund are not included in the budget presented here.

The expense portion of the operating budget is again presented in two different ways: by ministry area and by management area.

Figure 1 allocates expenses by ministry area. This chart reflects the current ministry areas, and the expenses that support these areas. Personnel and shared operating costs, including office and building expenses, have been allocated to the respective ministry areas.

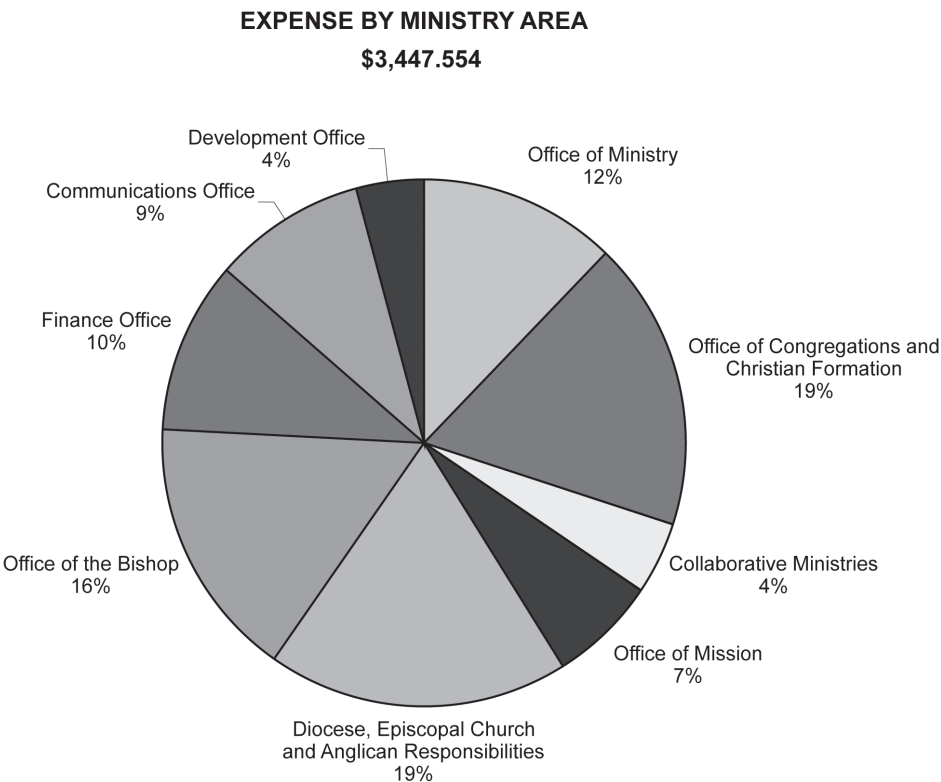
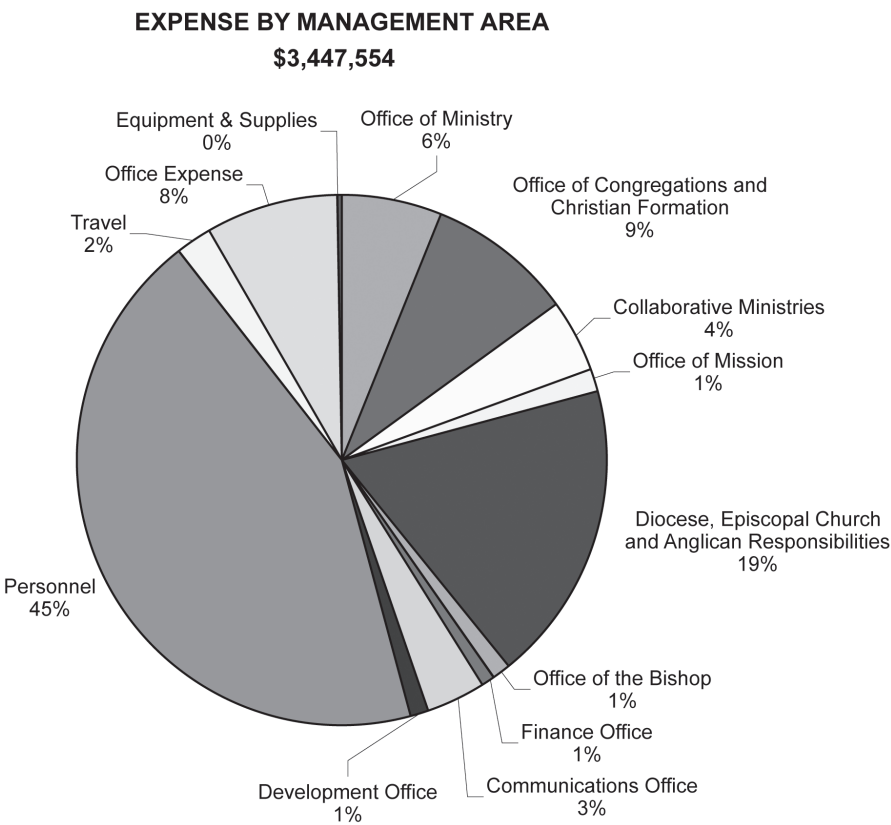


Figure 2 reflects the expenses shown in the budget summary (immediately following) by management area. Further details about the management areas and their use of funds are found in the budget narratives which follow the budget summary.



	2009 Budget			2010 Budget			Budget Summary
	Total	Special Funds	Operating	Total	Special Funds	Operating	
<b>RECEIPTS</b>							
<b>Support from Congregations</b>							
Assessments	\$2,500,000	\$0	\$2,500,000	\$2,425,000	\$0	\$2,425,000	
<b>Grants</b>							
Institute for Outreach	\$3,000	\$3,000	\$0	\$0	\$0	\$0	
Cleveland Foundation	\$2,000	\$0	\$2,000	\$2,000	\$0	\$2,000	
	\$5,000	\$3,000	\$2,000	\$2,000	\$0	\$2,000	
<b>Investment Income</b>							
Endowment Income—Missionary Fund	\$50,638	\$0	\$50,638	\$41,271	\$0	\$41,271	
Endowment Income—Diocesan Fund	\$178,029	\$0	\$178,029	\$145,098	\$0	\$145,098	
Endowment Income—Lay Pension & Custodial	\$8,864	\$0	\$8,864	\$7,225	\$0	\$7,225	
Endowment—ECSF Administration	\$37,651	\$0	\$37,651	\$30,687	\$0	\$30,687	
Endowment - Bishop's Office	\$40,000	\$0	\$40,000	\$40,000	\$0	\$40,000	
Endowment - Legacy Campaign	\$2,657	\$0	\$2,657	\$2,172	\$0	\$2,172	
Interest & Dividend Income	\$138,235	\$0	\$138,235	\$112,481	\$0	\$112,481	
	\$456,074	\$0	\$456,074	\$378,934	\$0	\$378,934	
<b>Fees Received for Administrative Services</b>							
Bishop Leonard Fund (Capital Loans & Grants)	\$17,700	\$0	\$17,700	\$18,300	\$0	\$18,300	
Holy Cross Fund	\$6,580	\$0	\$6,580	\$6,900	\$0	\$6,900	
Church Home Fund	\$36,000	\$0	\$36,000	\$36,960	\$0	\$36,960	
Brayton, Cooper & Darnell Funds	\$13,920	\$0	\$13,920	\$14,280	\$0	\$14,280	
Joint Investment Fund	\$73,200	\$0	\$73,200	\$77,000	\$0	\$77,000	
Other Education Funds Administration	\$4,400	\$0	\$4,400	\$4,500	\$0	\$4,500	
Miller Trust	\$19,800	\$0	\$19,800	\$20,400	\$0	\$20,400	
	\$171,600	\$0	\$171,600	\$178,340	\$0	\$178,340	
<b>Transfers</b>							
Education Funds	\$136,600	\$136,600	\$0	\$147,600	\$147,600	\$0	
BLF Capital Fund	\$129,036	\$129,036	\$0	\$121,380	\$121,380	\$0	
Disabled & Infirm Clergy Fund	\$12,000	\$12,000	\$0	\$12,000	\$12,000	\$0	
Bishop Leonard Discretionary Fund	\$1,000	\$1,000	\$0	\$0	\$0	\$0	
Bishop's Discretionary Fund	\$5,000	\$5,000	\$0	\$5,000	\$5,000	\$0	
Bishop's Fund for New Congregations	\$78,000	\$78,000	\$0	\$78,000	\$78,000	\$0	
Holy Cross Fund (for Chaplain R.B.&C. H.)	\$65,000	\$65,000	\$0	\$0	\$0	\$0	
Youth Scholarship Funds	\$2,000	\$2,000	\$0	\$2,000	\$2,000	\$0	
Legacy-AB Williams Endowment Income Fund	\$14,000	\$14,000	\$0	\$12,000	\$12,000	\$0	
Other Custodial Funds	\$0	\$0	\$0	\$24,000	\$24,000	\$0	
Bishop's Appeal	\$61,300	\$61,300	\$0	\$61,300	\$61,300	\$0	
	\$503,936	\$503,936	\$0	\$463,280	\$463,280	\$0	
<b>TOTAL AVAILABLE</b>	<b>\$3,636,610</b>	<b>\$506,936</b>	<b>\$3,129,674</b>	<b>\$3,447,554</b>	<b>\$463,280</b>	<b>\$2,984,274</b>	

**Budget Summary**

	2009 Budget			2010 Budget		
	Total	Special Funds	Operating	Total	Special Funds	Operating
<b>EXPENSES</b>						
<b>Ministries Office</b>						
Formation	\$127,800	\$110,800	\$17,000	\$127,800	\$111,800	\$16,000
Support	\$19,000	\$17,500	\$1,500	\$18,000	\$16,500	\$1,500
Development	\$55,550	\$53,600	\$1,950	\$55,550	\$54,600	\$950
Deployment (Transition Ministry)	\$5,450	\$0	\$5,450	\$5,450	\$0	\$5,450
Planning & Administration	\$7,010	\$0	\$7,010	\$7,010	\$0	\$7,010
	\$214,810	\$181,900	\$32,910	\$213,810	\$182,900	\$30,910
<b>Office For Congregations and Christian Formation</b>						
Administration & PERCEPT	\$13,500	\$0	\$13,500	\$13,500	\$0	\$13,500
Aid to Congregations						
Assisted Congregations	\$137,000	\$59,000	\$78,000	\$153,250	\$68,000	\$85,250
New Initiatives Research & Evangelism	\$4,000	\$0	\$4,000	\$4,000	\$0	\$4,000
Mission Enhancement Grants	\$25,000	\$0	\$25,000	\$32,000	\$26,000	\$6,000
Comprehensive Revitalization Program	\$30,000	\$28,000	\$2,000	\$0	\$0	\$0
Campus Ministry Grants	\$25,750	\$0	\$25,750	\$28,000	\$0	\$28,000
Natural Church Development	\$15,000	\$0	\$15,000	\$15,000	\$0	\$15,000
Education Programs for Congregations	\$30,500	\$0	\$30,500	\$31,500	\$14,000	\$17,500
Formation Programs for Youth and Adults	\$24,800	\$2,000	\$22,800	\$23,800	\$2,000	\$21,800
	\$305,550	\$89,000	\$216,550	\$301,050	\$110,000	\$191,050
<b>Diocese, Episcopal Church and Anglican Responsibilities</b>						
Mission of the General Church (assessment)	\$612,200	\$0	\$612,200	\$594,000	\$0	\$594,000
Provincial Synod (assessment)	\$6,735	\$0	\$6,735	\$6,735	\$0	\$6,735
Travel to Provincial Synod meetings and events	\$1,750	\$0	\$1,750	\$0	\$0	\$0
Diocesan Convention	\$25,000	\$0	\$25,000	\$17,000	\$0	\$17,000
Diocesan Council	\$3,000	\$0	\$3,000	\$2,000	\$0	\$2,000
To Reserve for Travel to General Convention	\$15,000	\$0	\$15,000	\$12,000	\$0	\$12,000
To Reserve for Travel Lambeth Conference	\$2,000	\$0	\$2,000	\$0	\$0	\$0
To Reserve for Future Episcopal Transition	\$15,000	\$0	\$15,000	\$5,000	\$0	\$5,000
	\$680,685	\$0	\$680,685	\$636,735	\$0	\$636,735
<b>Office For Mission</b>						
Administration and ER&D Promotion	\$500	\$0	\$500	\$2,500	\$0	\$2,500
Domestic & International Mission						
Millenium Development Goals @ .7%	\$22,000	\$0	\$22,000	\$21,000	\$0	\$21,000
Domestic & Intl. Mission & Service Projects	\$15,000	\$0	\$15,000	\$20,000	\$0	\$20,000
ECS, Hunger & Homelessness, Advocacy	\$4,000	\$0	\$4,000	\$2,500	\$0	\$2,500
Ohio Council of Churches	\$15,000	\$0	\$15,000	\$15,000	\$3,000	\$12,000
Commission to End Racism	\$5,000	\$5,000	\$0	\$3,000	\$3,000	\$0
	\$61,500	\$5,000	\$56,500	\$64,000	\$6,000	\$58,000
<b>Collaborative Ministries</b>						
Chaplain Babies & Children's Hospital	\$65,000	\$65,000	\$0	\$0	\$0	\$0
Cedar Hills Camp & Conference Center	\$152,000	\$0	\$152,000	\$122,000	\$0	\$122,000

	2009 Budget			2010 Budget		
	Total	Special Funds	Operating	Total	Special Funds	Operating
Trinity Commons Books & Gifts	\$0	\$0	\$0	\$15,000	\$0	\$15,000
Community Development-Link Deposit	\$2,000	\$0	\$2,000	\$0	\$0	\$0
	\$219,000	\$65,000	\$154,000	\$137,000	\$0	\$137,000
<b>Office of the Bishop</b>	\$40,100	\$5,000	\$35,100	\$36,100	\$10,000	\$26,100
<b>Finance Office</b>	\$38,800	\$0	\$38,800	\$31,800	\$0	\$31,800
<b>Development Office</b>	\$46,600	\$28,000	\$18,600	\$39,600	\$25,000	\$14,600
<b>Communications Office</b>	\$123,835	\$0	\$123,835	\$117,835	\$0	\$117,835
<b>Personnel</b>	\$1,526,080	\$3,000	\$1,523,080	\$1,503,680	\$8,000	\$1,495,680
<b>Travel</b>	\$80,000	\$0	\$80,000	\$76,000	\$0	\$76,000
<b>Office</b>	\$280,550	\$129,036	\$151,514	\$278,844	\$121,380	\$157,464
<b>Equipment &amp; Supplies</b>	\$19,100	\$1,000	\$18,100	\$11,100	\$0	\$11,100
	\$2,155,065	\$166,036	\$1,989,029	\$2,094,959	\$164,380	\$1,930,579
<b>TOTAL EXPENSES</b>	<b>\$3,636,610</b>	<b>\$506,936</b>	<b>\$3,129,674</b>	<b>\$3,447,554</b>	<b>\$463,280</b>	<b>\$2,984,274</b>
<b>TOTAL RECEIPTS OVER (UNDER) EXPENSES</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## Funding for the 2010 Program and Budget

### Funding Sources

Funding for the budget comes primarily from four sources:

- **Parish Payment of Support** for our Diocesan Program: \$2,425,000 (which funds 70.3% of total expenses, and includes amounts due for both current and prior years)
- **Endowment and Investment income:** \$378,934 (funds 11.0%)
- **Fees Received for Administrative Services:** \$178,340 (funds 5.2%)
- **Transfers:** \$463,280 (funds 13.4%)

The remaining funds are from grants, in the amount of \$2,000, which funds .1%.

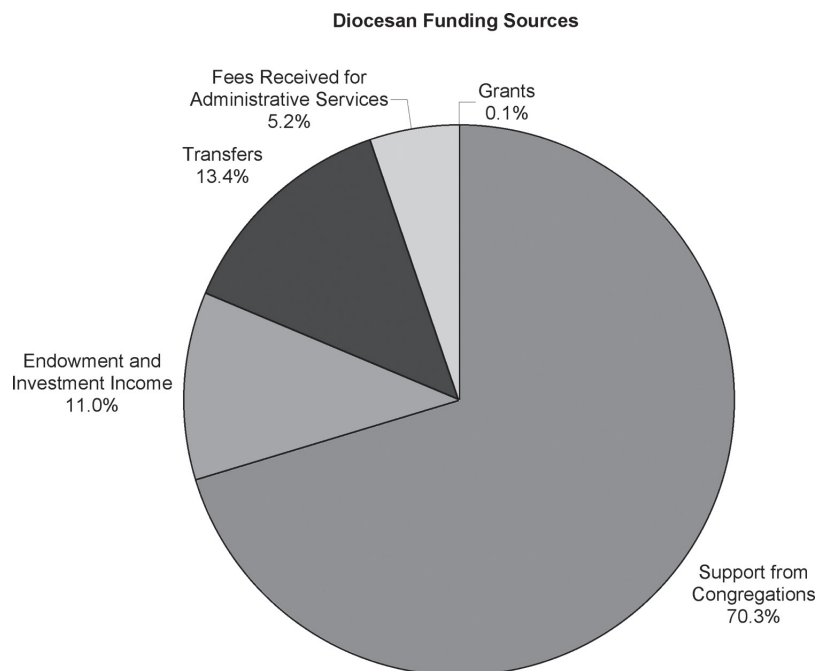
**Parish Support** is projected to decrease \$75,000 (3.0% from the 2009 budget). This decrease is based on the estimated support from parishes decreasing in 2009 and estimated to continue declining in 2010, from its 2008 level.

The decrease of \$77,110 (16.9% from the 2009 budget) in **Endowment and Investment Income** results primarily from the reduction in the spending rule approved by the Trustees, and actual decline in market value of the endowment and custodial funds. The Trustees approved a spending rule of 4% for 2010, which is a reduction from 4.5% in 2008 and 2009. This reduction was deemed necessary to preserve the purchasing power of the endowment funds and sustain their use for the mission of the Diocese.

**Fees for Administrative Services** represent a reimbursement to the personnel expense category for time spent by staff in the administration and distribution process for grants made from specific custodial funds. The total represents an increase of \$6,740, or 3.9% from the 2009 budget.

**Transfers** represent funding for specific programs that meet donor restrictions on the use of the respective custodial funds. The total represents a decrease of \$40,656, or 8.0% from the 2009 budget. The net reduction includes decreases of \$65,000 from funding the chaplaincy at Rainbow Babies and Children's Hospital, \$7,656 from the Loans and Grants funds, due to reduction in the spending rule, and the elimination of funding from the BLF discretionary funds of \$1,000. Increases in transfers included \$11,000 for clergy and lay continuing education and grants, \$19,000 from previously unused custodial funds for congregations, and \$3,000 from custodial funds for staff continuing education and training.

The total proposed budget provides funding of \$3,447,554, a decrease of \$189,056 (5.2%) over the 2009 budget.





## Ministries Office

### **Transition (Deployment) Ministry**

Working with the bishop, the Ministries Office assists parishes during the transition between settled clergy, in the search for new clergy leadership. Services provided to parishes include assisting the wardens and vestry in planning the interim period; providing interim consultants and names of potential interim clergy; coordinating with the national Church Transitions Office; publicizing openings in various venues; referencing and consulting with the bishop about prospective candidates; providing resources and training for interim consultants and interim pastors; providing resources for the search committee, vestry and wardens; keeping the bishop informed of the progress of all searches; assisting in the final call and in the negotiation of a letter of agreement with the clergy person; and finally assisting in the start up of the new ministry.

### **Commission on Ministry**

The primary purposes of the Commission on Ministry are to advise and assist the bishop in the work of discernment, formation and support for persons in Holy Orders and to support the ministries of lay professionals in the Diocese of Ohio. The primary tasks of the Commission include determining, together with the bishop, the present and future needs in the diocese's ministry; recruiting and assisting in the selection of personnel for Holy Orders; providing for the guidance, pastoral care, and continuing education of clergy and lay professionals; determining clergy compensation standards; and attending to the professional and personal needs of the clergy and lay professionals and their families.

### **Clergy Formation**

**Scholarship Assistance:** The Diocese of Ohio has been fortunate to be able to provide substantial financial assistance to individuals who are in the process of education and formation for ordained ministry. The Diocese's ability to offer scholarships for theological education is a result of the generosity of a number of benefactors over the years that have made provisions in their wills for such endowments. Due to the reduced income from endowments and a desire to shift the use of educational endowment funds to internships for newly ordained clergy in coming years, the seminarians receive support in the range of \$3,000 - \$7,500. The Diocese of Ohio is providing scholarships for eight seminarians during the 2009-2010 academic year.

**Deacon Formation Program:** A key piece in our diocesan priority to develop servant leaders is have a strong network of deacons who are able to both call members of the diocese to develop their own diaconal ministry and assist individuals in understanding how their actions are spiritually formative. Individuals in this process gather twice a month for classes taught by members of the diocese and via on-line courses through a variety of seminaries. In 2010, \$15,000 is allocated towards this process.

**Special Ministries:** 2010 is the fourth year to "Develop and Employ Creative Models for Congregational Ministry" into three ministries. Money is generated through donations to the bishop's Annual Appeal and interest earned on the Miller Endowment Fund. These funds are used to underwrite the salary of a college chaplain at Bowling Green State University. Funds are also being applied towards the salary of a full-time clergy person in a new shared ministry with St. Stephen's, East Liverpool and St. Stephen's, Steubenville. Internship expenditures such as these are essential for providing resources to deploy clergy who have gone through our formation process and to initiate critical and strategic new ministries.

**Summer Internships:** Money in special funds is also being allocated for summer internships for seminarians to be given a full time summer experience.

### **Clergy & Lay Professional Support**

Supporting and strengthening the clergy for leadership is one of the primary emphases of the ministries of the Diocese of Ohio. Believing that the health of congregations is directly influenced by the health of the clergy serving them, the Commission on Ministry offers and oversees programs for

clergy and their families. Programs and offerings include: the Fresh Start program for systematic support for clergy in new positions be they newly ordained or experienced; and funding for a chaplain for clergy spouses and partners. The bishop's Winter Gathering (a conference for clergy and their spouses or partners) offers 3 days and 2 nights of fellowship and education; and a subsidy is provided for a percentage of the cost of confidential counseling by professional counselors for clergy and members of their families. Other events have been planned in the past to provide support for lay professionals and for the children of clergy and lay professionals.

#### **Clergy Development**

In an effort to assist in the ongoing development of clergy, a variety of programs are offered. Clergy days provide opportunities for clergy to gather with the bishop. The annual Clergy Conference in May provided significant continuing education opportunities in addition to time for worship and building collegial relationships. This year the poet Marie Howe and the Right Rev. Michael Curry offered a wonderful mixture of spiritual and practical guidance. Clergy Development also includes continuing education and sabbatical grants for clergy and lay professionals which are funded from two endowment funds. Partnerships to provide continuing education programs on an ecumenical basis have allowed continuing education funds to be used more effectively in recent years.

## Office for Congregations and Christian Formation

The offices of Christian formation and congregational development have become one office in the Diocese of Ohio, because we recognize the integral relationship between these two areas of our lives as Christians. Healthy, growing Christian individuals form the heart of vibrant Christian congregations. Equally so, vibrant Christian congregations create fertile ground for healthy, growing Christian individuals. The Canon for Congregations and the Canon for Christian Formation work together to provide resources, planning, and assistance to all congregations in the Diocese as we grow in these ways.

This new office was created after the budget process for 2010 was finalized so this year the budget is combined, but still organized in much the same way as previous years. We anticipate the 2011 budget will likely be organized differently. Below, listed in the same order as the full diocesan budget, is a brief explanation of each line item in our office's 2010 budget.

### Administration

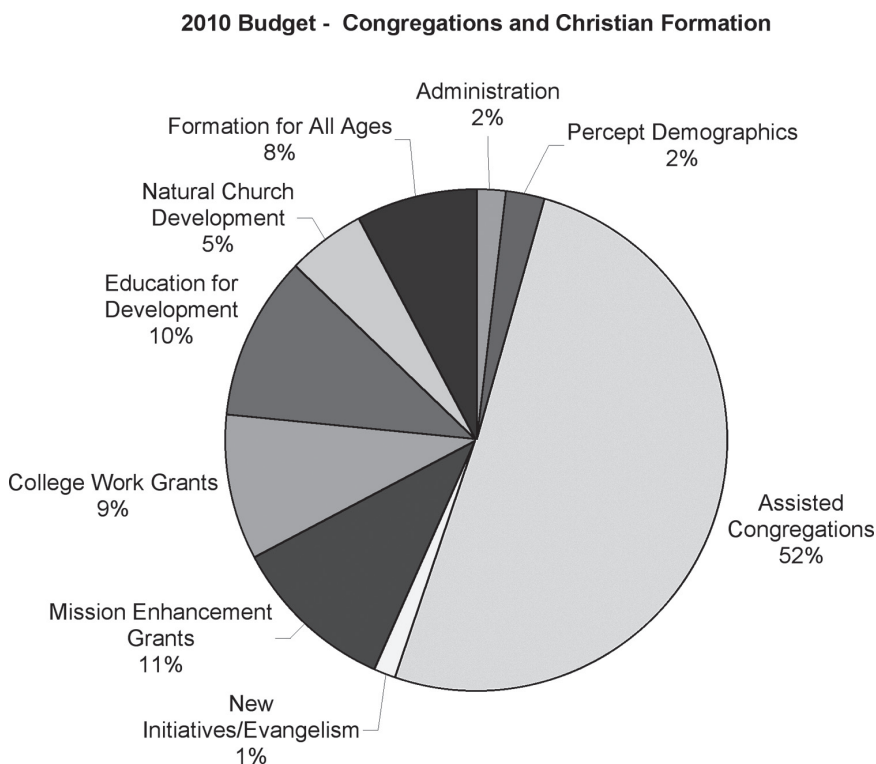
The office will continue to operate on the same Administrative budget as 2009. This represents 2% of our expenditures.

### Percept Demographics

We are working with Percept to review our relationship with them to provide quality demographic information to us. If your parish is interested in such information please let us know. We will be glad to help you obtain it at no cost to your parish, and your interest (or lack of) will help us make decisions about Percept for the future. This represents 2% of our expenditures.

### Assisted Congregations

By far the largest expense for this office comes in the form of financial assistance to congregations and shared ministries for support as they work to become financially self-sufficient. All congregations receiving such assistance are or soon will be involved in Natural Church Development, our primary congregational development process. This represents 51% of our expenditures.



### New Initiatives/ Evangelism

This year we will begin offering a significant new parish-based evangelism process called "Unbinding the Gospel". It is a long-term process, based upon prayer and sharing our stories, that trains specifically mainline denomination congregations in real-life evangelism. This represents 1% of our expenditures, though these are not the only funds we use for evangelism.

**Mission Enhancement Grants**

Grants of up to \$5000 are available to parishes to assist them in growing their congregation, creating new formation ministries, enhancing their worship, becoming more visible in their community, and so on. This represents 11% of our expenditures.

**College Work Grants**

These grants are available to parishes in the diocese wishing to develop a significant ongoing ministry with a nearby college or university. This represents 9% of our expenditures.

**Education for Development**

This includes all a variety of efforts to educate: Shared Ministry Conversations, the Diocesan Winter Convocation for the entire diocese, occasional educational days for different purposes, and individual continuing-education efforts undertaken by members of the laity. This represents 10% of our expenditures.

**Natural Church Development (NCD)**

NCD is our diocese's primary vehicle for congregational assessment and development in vitality and health. These funds support the work of training coaches to work with parishes in our diocese. This represents 5% of our expenditures.

**Christian Formation for All Ages**

Our primary goal here is to help equip parish leaders and teachers to provide effective Christian formation at a congregational level. We can help you assess your current status and develop specific programming for your congregation, including train the trainer, small group leader training, and more. These funds help us provide resources and training in this work. They are also used to support our annual Kenyon Conference in conjunction with the Diocese of Southern Ohio. This represents 8% of our expenditures.

## **Diocesan, Episcopal Church, and Anglican Communion Responsibilities**

This category of the budget represents expenses relating to our life as a diocese of the Episcopal Church in the Anglican Communion.

The largest item of \$594,000 is the **Diocese of Ohio's share of the Episcopal Church's budget**, as adopted by General Convention. The 2010 figure is \$18,200 lower than 2009, due to lower assessment income in 2008 vs. 2007. At the 2009 General Convention, the exemption was raised by \$20,000 to \$120,000, which saves the Diocese \$4,200 in 2010. The assessment rate was decreased by 1% for the years 2011 and 2012, which will save the Diocese additional funds in these years. Full payment of our calculated share is a long-standing commitment of the diocese. This amount is calculated as follows:

$(2008 \text{ Operating Income less } \$120,000) \times 21\%$

The **provincial synod assessment** of \$6,735 is calculated at 1.1% of our assessment to the national church (\$612,200 x 1.1%). The amounts for **travel to province education events** and the **travel to provincial synod** were eliminated in the 2010 budget, since these amounts are not needed.

Expenses of the annual **Diocesan Convention** decrease by \$8,000 to \$17,000. The audio-visual cost was substantially reduced for 2010. An amount of \$2,000 is budgeted for **Diocesan Council** in 2010, which pays for copies, postage, and the annual orientation meeting in December for the full Council.

The allocation for **Reserve for Travel to General Convention** is decreased by \$3,000 to \$12,000. An endowment fund provides income for the triennial General Convention and these funds, along with existing reserves, are estimated to be adequate for the 2012 Convention in Indianapolis, IN. The Reserve for Travel – Lambeth Conference was not funded in 2010, due to remaining reserves from the 2008 Conference. Funding for the 2018 Conference is expected to commence in 2011. The amount for Reserve for Future Episcopal Transition was decreased by \$10,000 to \$5,000. Current levels and the addition of investment earnings are adequate for the present time; additional funds may be needed in later years.

## **Collaborative Ministries**

This section of the budget addresses ministries that cannot be funded by a single parish, but are instead funded by pooling our resources as a diocese through collaboration. These ministries include: Cedar Hills Camp & Conference Center, Trinity Commons Books & Gifts, and Community Development-Linked Deposit.

Changes in the 2010 budget for existing programs include:

- Contributions toward the operating expenses of Cedar Hills Camp & Conference Center, \$122,000. This amount represents a 19.7% reduction from the 2009 level.
- Community Development – Linked Deposit, \$0 in 2010. The Diocesan Council previously authorized up to \$100,000 of endowment funds for investment in Linked Deposits in banks, which make below market rate loans for selected community development projects. The long-term earning potential of the invested funds remains intact by reimbursing the endowment fund for the amount of appreciation forfeited by making the community development investment. The actual amount depends both on the appreciation experienced by the Joint Investment Fund and portion of the \$100,000 that is actually invested during the year. Currently, none of the \$100,000 authorization is invested.
- Chaplain-Rainbow Babies & Children's Hospital – This funding was eliminated in the 2010 budget. The position is currently vacant, and we are considering how best to utilize these funds in the future.
- Trinity Commons Books & Gifts – The 2010 budget includes an allocation to the operating budget of the bookstore of \$15,000. Previous budgets have not included this support, but Council has authorized prior losses. The operation of the bookstore is now jointly supported by the Diocese and Trinity Cathedral.

### **Cedar Hills Camp and Conference Center**

The allocation in the diocesan budget for Cedar Hills in 2010 is \$122,000. These monies represent 37.5% of the Cedar Hills annual operating budget of \$324,471. This allocation reflects a \$30,000 decrease, or 19.7% from last year's diocesan support to Cedar Hills. In the past five years, when considering the needs of Cedar Hills no consideration has been given to inflation and the necessary maintenance of our aging facilities. This decrease in diocesan support will require significant changes at Cedar Hills.

The Executive Director, the Rev. Peter W. Nielsen III, will take on the direct monitoring of all operating systems to accommodate the demands of regulatory agencies (potable water, septic plant and pool), as well as, the hiring and follow-up with multiple service providers in various categories to accomplish property-related tasks that he cannot handle himself or through a corps of volunteers.

Once again, Cedar Hills will offer a nine-month calendar running from mid-February until mid-November offering both program and hospitality. During the hard winter season, Cedar Hills will not entertain guests and will minimize operating costs, as the cost of operating during these months tends to exceed the historic capacity to generate revenues. During the three winter months the director, and the part time administrative assistant, will take earned time off, maintain the property, invest their time in program design and preparation, as well as market Cedar Hills to user groups and programs with the intention of maximizing our revenue-generating potential during our nine months of operation.

The advantage to this plan is that we will have the time to prepare marketing materials and design programs that are well thought out, as well as invest some time in property maintenance that is not easily done during the operating months. Our challenge continues to be accommodating the increase in facility and program costs with the limitations inherent in the property and with a minimized staff. As we look to the future of Cedar Hills, it is important to recognize that we have met the challenges in our past and we will continue to meet the challenges in the future. The diocesan family will be celebrating 50 years of ministry at Cedar Hills Camp and Conference Center in 2010.

The allocation to Cedar Hills is best understood as general support in the following categories:

**Personnel**—The Executive Director, 1-part time hourly Administrative Assistant, a few part-time hourly Services Assistants, 20 – part-time seasonal stipendiary Summer Camp Program Staff.

**Program**—Although there are smaller programs throughout the year the primary program offered through Cedar Hills continues to be the Camp Cedar Hills. Camp Cedar Hills provides 30,000 contact hours per season engaging campers and staff alike in exploration of their relationship with God, and how they are called to respond to that relationship through action. In 2009, we experienced a minimal loss in campers, compared with other camps. In 2010, we look to grow both camper numbers and Episcopal leadership.

We will continue offering the best hospitality we are able within the construct of our facilities and staffing configuration during the coming year.

**Property**—A large portion of the operating cost of Cedar Hills is incurred in maintaining the property of 191-acres with eight program buildings and supporting infrastructure. Each year we make some small progress in addressing deferred maintenance; however, each year our supporting infrastructure and buildings become another year older and more susceptible to breakdown.

The challenges, limitations, as well as the many blessings experienced at Cedar Hills focus our time to reflect, pray and celebrate our dependence on God, and our continued commitment to the ministry shared by many children, youth and adults who utilize our conference center.

This year it is important to note that the Diocesan Council, and Office of the Bishop, has engaged a task force to discover the nature of camp and conference ministries in the life and mission of the Diocese of Ohio. This research and discovery will certainly have an impact on the future ministry of Cedar Hills. I suspect their work will affirm some past initiatives, identify new opportunities for mission, and help us discern the future use of the asset we have at Cedar Hills.

#### **Trinity Commons Books & Gifts**

In 2009 Trinity Commons Books & Gifts (formerly Sacred Path Books & Art) became a jointly operated ministry of Trinity Cathedral and the Diocese of Ohio. As a diocesan ministry, it exists to offer resources to support individuals from around the diocese on their spiritual journey and be a resource to congregations in their ministry. As a ministry of Trinity Cathedral and Trinity Commons, TCB&G provides support to the Cathedral congregation and other groups using the building, and is a Christian witness and retail resource in downtown Cleveland. The bookstore carries a diverse selection of titles on prayer, spirituality, peace and justice, Christian formation, world religions, art/creativity and young adult/children's topics, as well as a quality assortment of gifts from local artists. TCB&G also travels to off-site events: events that serve parishes and wider communities in a multitude of ways. These events increase our sales potential and have a powerful promotional and marketing benefit. The staff takes the store "on the road" for conferences and other major programs.

This past year has again been a time of transition. In addition to becoming a collaborative ministry of the Cathedral and the Diocese, Michael Lawrence replaced Clara Sayre as the store's manager. He is the fourth permanent/interim manager in three years. While many changes have been implemented in the last year, Trinity Commons Books & Gifts still struggles to be financially viable. The economy, decreased purchases by parishes, and lower attendance at diocesan conferences have had a significant impact on store sales. Recognizing that it will take more time for TCB&G to operate without a deficit, the Diocesan Council has for the first time included a \$15,000 line item to account for potential losses (equally shared by the Diocese and Trinity Cathedral).

## **Mission Ministries**

Episcopal Community Services, Commission on Global and Domestic Mission, Commission to End Racism, Diocesan Advocacy Committee, Jubilee Ministries, United Thank Offering, Companion Relationships, and Deaconate Ministry, all fall under the banner of Mission Ministry. This has now become a new office in the Diocese of Ohio because we recognize the importance in serving Christ as we give of ourselves in service ministry to the people of God. Healthy and growing Christians come to know the power of what it means to serve by giving of oneself in the service of others. Equally so, vibrant Christian ministers, lay and ordained, create fertile ground for spiritual health, and vital growth for congregations, vocations, and the Diocese at large. The Canon for Mission, working together with committees, parishes, rectors, and the people of this Diocese, works to be the best resource in the Diocese as we discover how to give in new ways.

This new office was created after the budget process for 2010 was finalized. So you will see that much of the same work is proposed in the same way as it has been in years past. We do anticipate that the 2011 budget will be organized in a new manner. Below, listed in the same order as the full diocesan budget, is a brief explanation of each line item in our office's 2010 budget.

### **Commission on Global and Domestic Mission**

- **MDGs**—Commission formed by 2006 Diocesan Convention to lead the diocese in addressing the MDG and local poverty through education, organization, and empowerment of parishes. The Commission makes recommendations to the Diocesan Council and Bishop regarding how the 0.7% allocation of Diocesan Operating Budget for MDG is used. \$21,000
- **Companion Relationships**—This year at Diocesan Convention, the Diocese will receive recommendations from the CGDM to explore further a Companion relationship with two Provinces, one in Africa, and the other in South America, as we discover how best to learn more from each other as the Body of Christ.
- **Domestic and International Mission and Service Projects**—The Diocesan Council has authorized the Bishop and CGDM to jointly make decisions regarding the allocation of this budget line. Council has mandated that one-half of the funds be allocated toward domestic projects and one-half toward international projects. \$20,000

### **Hunger and Homelessness Task Force**

The Hunger and Homelessness task force has met over the last three years to address the issues and concern of homelessness and hunger in our Diocese. At the final meeting came forth recommendations for the Diocese to consider.

### **Commission to End Racism**

The Commission to End Racism seeks an end to racism in the diocese by facilitating dialogue on the issue of racism and by promoting greater awareness of racism and diversity through programming and education. \$3,000

### **Ohio Council of Churches**

The Ohio Council of Churches seeks to challenge our members to learn from our diversity, to witness our faith, and celebrate our oneness with the Body of Christ.

- Share theological understanding in dialogue and worship;
- Identify common concerns, while understanding and respecting the theological and structural differences;
- Advocate for social policies, seeking justice for and with those with no voice;
- Nurture dialogue and common efforts among judicatory executives/bishops
- Communicate with and among regional ecumenical bodies in Ohio, creating opportunities for dialogue and partnering.

\$15,000



### **Diocesan Advocacy Committee**

This committee assists in identifying a focus for advocacy in the diocese and is a resource to parishes participating in diocesan advocacy. The Bishop and Diocesan Council, acting on a recommendation from the Advocacy Committee, name a fundamental societal need that parishes are invited and encouraged to address individually and collectively to effect transformation and healing.

### **Jubilee Ministries**

This program was founded in 1982 for the purpose of affirming churches doing the work Christ commissions us to do among poor and oppressed people such as, providing food to the hungry, shelter to the homeless and welcome to the stranger... (Matt. 25). The program issues grants as a concrete expression of the church's commitment to this ministry. The Jubilee Ministry Mandate: To be a "ministry of joint discipleship in Christ with poor and oppressed people, wherever they are found, to meet basic human needs and to build a just society." \$1,000

### **Episcopal Community Services**

The Episcopal Community Services (ECS) mission is to promote a reconciling Episcopal witness that encourages justice through service, compassion, and liberation, empowering both those being served and those who serve. ECS lives out its mission through the collection and organization of programmatic and financial resources, in particular conducting an annual campaign; through grant distributions to parish and community initiatives that serve the needs of communities in the diocese; and through support to Episcopal parishes and collaborative initiatives that educate and advocate for systemic change, justice, and liberation. ECS continues to be central to our common Christian witness in the Diocese of Ohio, integrating and encouraging service as formation, and biblically modeled advocacy on behalf of those most needy and without voice. The major work of ECS, to address issues of human need in our midst, is accomplished by providing grant support to parish and community service agencies that work hard to provide compassionate care to the marginalized in our society.

Episcopal Community Services manages the distribution of grant monies received from the Trustees of the Diocese and from the annual appeal, and provides strategic planning and policy guidelines for consistent fund allocation to Episcopal, ecumenical, and community services that address human need. ECS grant criteria strongly encourage Episcopal participation and collaboration.

The ECS Development Council is in the process of reviewing 48 applications for program support. The 2009 requests for funding total over \$389,000 and represent youth, education, prison ministry, legal services, housing, homelessness, health, and hunger programs. More than 50% of the applications are from programs administered by Episcopal congregations inviting ECS to partner with them in local mission. ECS also continues, under the direction of the Diocesan Trustees, to administer grant requests for services to the elderly on behalf of the Church Home Endowment. By year's end, nearly \$197,000 will be distributed from the Church Home Endowment to programs providing services to the elderly.

### **United Thank Offering**

The United Thank Offering is a program of The Episcopal Church for the mission of the whole Church, founded by and administered by women since 1889. The United Thank Offering Committee is a spiritual and financial partner in the mission work of The Episcopal Church, through every person in every pew. UTO is entrusted to promote thank offerings, to receive the offerings, and to distribute the United Thank Offering monies through grants. The Committee awards and administers these grants within the framework of the policies and procedures of the Domestic and Foreign Missionary Society (DFMS) of The Episcopal Church. The mission of the United Thank Offering is to expand the circle of thankful people. To achieve this mission we encourage daily prayers, offerings, and awareness of the abundance of God's blessings.

## Office of the Bishop and Support Offices

### Office of the Bishop

The core of this section remains unchanged from the 2009 level. Money remains available in this section of the budget to fund new emerging initiatives that were unknown and unfunded at the time of approving this budget. Keeping some money in this line item gives Diocesan Council and the Bishop financial resources to fund such initiatives without having to pull money away from other ministries or effectively creating a deficit budget by introducing an unbudgeted expense. The reduction in money for reimbursing deans presupposes that the proposed canonical changes in the deanery system will pass, reducing the number of deans from ten to eight. There are also changes that are minor with some funding being supplied by special funds as opposed to coming from the Operating Fund Income.

### Finance Office

The total of \$31,800 for the Finance Office represents a \$7,000 decrease from the 2009 budget. The budget consists of administrative expenses and financial resource costs of \$4,400 maintenance costs for the accounting software of \$4,000, bank fees of \$300, archive expenses of \$700, payroll preparation costs of \$2,400, and the fee for the Diocesan audit of \$20,000. These costs are substantially the same as in 2009, except for the audit fee, which was reduced by \$7,000, based on engaging a smaller, more local firm to perform the 2009 audit.

The primary focus of the Finance Office is the SERVE component of the mission statement. In this capacity, finance administers the Joint Investment Fund for the Trustees of the Diocese (investments of about \$31 million and 248 Diocesan and parish accounts); the health and dental insurance programs (offered by The Medical Trust, part of the Church Pension Group) for 95 lay and clergy employees and their families; the Capital Loans and Grants program; maintains records of all gifts and grants to ECSF, the Trinity Commons Books & Gifts, and other gifts; provides training for parish treasurers and bookkeepers in accounting and internal controls; coordinates the CPA audits of the Diocese and the Joint Investment Fund, as well as the Diocesan audit team (for parish audits) and committee and CPA audits of parishes; works with parishes in meeting their canonical requirements for reporting in the areas of assessments, insurance, lay pensions, and parochial reports; and provides accounting, payroll, financial reporting and budgeting for all diocesan operations (Council, Trustees, Cedar Hills, Trinity Commons Books & Gifts, ECSF, the Church Home and Holy Cross Fund).

### Development Office

The Development Office exists to promote service to God in our care for our church and in thanksgiving for all that has been given to us by God; to promote sacrificial giving as a spiritual surrender of self to God; and to encourage the people of the diocese to own more fully our identities as stewards of God's kingdom.

### The Bishop's Annual Appeal

#### Meeting the Challenge of Challenging Times

The Bishop's Annual Appeal, in its fifth year, provides necessary resources for leadership development, servant hood, youth mission, and Episcopal Community Services (ECS). The Appeal encourages annual giving to ECS and is effectively broadening parochial and diocesan opportunities to serve by providing financial resources for strategic priorities of benefit to the entire diocese.

**2008 Appeal.** The total 2008 campaign contributions exceeded \$267,000. Your generosity provided Episcopal Community Services with \$100,000 for direct funding of services to those in need across the Diocese of Ohio. In addition, over \$138,000 has been allocated for initiatives to provide opportunities to grow, give, and serve, such as the diocesan youth mission trips to send young people to serve within the diocese and around the country; internships for seminarians and recently ordained clergy; and college and university campus ministry to form and inspire a new generation of servant leaders.

**2009 Appeal.** At the end of September, 89% of the 2009 campaign goal of \$267,500 has been realized with 80 congregations participating thus far in the campaign. With need ever increasing during these

challenging times, there is room to do more. Your participation in The Bishop's Annual Appeal, this year and every year, is invited, encouraged, and important to grow our resource for service and mission.

### **Giving as Spiritual Surrender**

The Development Office serves as a link to a full spectrum of local, diocesan, and national stewardship and development resources to serve the programs and parishes of the diocese; to help coordinate productive partnerships between parishes; and to provide the financial resources to facilitate collaboration or initiation of new programs.

Planned giving offers a unique opportunity to give back to the church all that it has given to us. A planned gift to the Diocese of Ohio is especially meaningful because these gifts provide long-term support to strengthen the diocese's ability to meet future challenges and ministry opportunities. With your help, The Diocese of Ohio supports planned giving efforts to build Diocesan Endowment through The Sterling Newell Endowment Society, a diocesan gift society established to honor those providing lasting financial witness to the mission of the Diocese, and through local parish endowment strategies such as Charitable Gift Annuities.

### **Communications Office**

The 2008 report to Diocesan Convention discussed three initiatives for the Communications Office during 2009. These were:

1. Redesign of the Website
2. Redesign of *ChurchLife!*
3. Update of our database

We also developed an "elevator speech" for the diocese to help with advertising and to provide a common identity among our parishes. An "elevator speech" allows us to tell others quickly and succinctly who we are and what we believe as Episcopalians.

With the help of Diocesan Council and the Communications Committee, we came up with the following wording:

**We have faith in God.** We treasure our ancient heritage with its rich liturgy, and we actively explore new ways to express our Christian faith.

**We reach out to others.** We work as the body of Jesus Christ in the world, advocating for peace and justice as we serve God's diverse creation.

**We seek change in ourselves and in the world.** We welcome questions and conversations about hard issues, believing that the Holy Spirit transforms us in our struggles. We are not always of one mind, but we are firmly tied together by God's love and our shared commitment to Jesus Christ.

Everyone is invited. All are welcome.

We are the Episcopal Church in northern Ohio.

We continue to offer website development for parishes that either need a website or need their website updated. Our part-time technology consultant, Bill Joseph, New Life, Uniontown, is available to any parish to help with website advice or development.

The Communications Office was the recipient of five Polly Bond Awards in 2009 (based on 2008 work), which are awards given out by the Episcopal Communicators for excellence in journalism, design, advertising, and publicity.

### **ChurchLife!**

With the spring issue of *ChurchLife!* (the first in 2009), we introduced our new design and format for the quarterly magazine. The initial impetus for the change was financial. We were able to save over

\$9,000 from 2008 by going to an 8.5" x 11" format with a glossy cover and high-quality newsprint inside, all of it four color. It has also allowed us to be more flexible in size, since we can easily increase or decrease the number of pages as needed. Kristin Crites, assistant in the Office of Communications and graphic designer, developed the magazine's "look". The total budget for *ChurchLife!*, including printing, postage, mailing list management, and freelance photography and writing assistance is \$44,065, compared with over \$53,000 in past years.

### **Diocesan Website**

The redesign is underway with the help of two outside consultants. We are creating two websites—one for visitors and parishioners within our diocese, which will be an updated and more easily navigable website. Our consultants are working with the "look" of the website to make the design more contemporary, something we don't have the expertise to accomplish in-house, while Kristin Crites, Bill Joseph, and I work on the structure and navigation. We have enlisted all staff members in helping to design the information for their own offices. The website will continue to use the CMS open source templates from Joomla that we have had for several years, but we are upgrading to the latest version of Joomla.

We are also designing a second website that is designed to appeal to a much younger, unchurched audience. Based on our research of two years ago, we found that younger audiences do not respond well to traditional church websites, frequently consider themselves "spiritual but not religious," and have many questions they would like answered but are afraid or uncertain of the answers they would get in a traditional church. Most of all, they are looking for authenticity and honesty from the people of whom they ask questions. We want them to feel that their questions are welcome, whatever they may be. This website will be "edgier," will include some facebook-like quizzes to help them find a direction in their spiritual life, and will help connect them with other seekers. In addition to our research, we have enlisted the help of Pastor Joe Kovitch, who runs the Lutheran-Episcopal campus ministry at Cleveland State University and Case Western Reserve University, and some of the students with whom he works, to design the questions and quizzes. Although this website will be sponsored by the Episcopal Diocese of Ohio, it will not have a specifically Episcopal message. Its purpose is to engage young people in thinking about their spiritual journeys and bringing them into a life lived with God at its center.

### **Videoconferencing**

We have completed one year with MegaMeeting, a web-based videoconferencing provider, so that committees and commissions of the diocese can meet remotely, and we have provided live coverage of Diocesan Convention and regional meetings. We also provided equipment to eight parishes around the diocese, so that no one would have to drive longer than one hour to attend certain meetings. The eight parishes are: St. Stephen's, Steubenville; St. John's, Youngstown; Grace, Mansfield; St. Paul's, Canton; Trinity Cathedral; Grace, Sandusky; Trinity, Toledo; and St. Mark's, Sidney. Anyone with a camera and headphones on his or her computer can also join in MegaMeeting. After one year of working with MegaMeeting, we still have uneven results. We are currently considering a second, dedicated T1 line to help with the lag time between speaking and hearing, which can make meetings difficult.

We have also used MegaMeeting to broadcast Tuesdays@12 (formerly Tuesday@10), which are one-hour web classes provided mainly by diocesan staff for anyone who can join in. Part of the hour is set aside for questions, in which participants can type in their questions and comments. These broadcasts are also made available by podcast on the website.

### **Database**

The Communications Office has overseen an update of our database from FileMaker 6 to FileMaker 10. All computers are now equipped with the new version, and we are currently running both versions of Filemaker until we are sure the bugs are worked out.

### **Advertising**

We continue to offer advertising for special events for parishes and provide designs for them when needed. Feel free to ask us about any advertising you would like to do. We are in the process of de-

signing advertising for the Episcopal Church in the Diocese of Ohio, which can be used by individual parishes starting with Advent this year and continuing throughout 2010.

Kristin Crites, administrative assistant and graphic designer in the Office of Communications, continues to do the design work for this office and for others on request. Martha Wright, Director of Communications, is available to speak to any parish, vestry, or group in the diocese about parish communications.

The budget for the Communications Office for 2010 is 5% less than it was for 2009. Last year we reduced the cost of printing and mailing *ChurchLife!* and we reduced the cost of printing the Diocesan Journal by posting it on the Website, rather than printing a copy for each parish. For the coming year, we reduced by 5% the budget for advertising. No other changes were made to the budget from 2009.

### **Personnel, Travel, Office Equipment and Supplies**

#### **Personnel**

Expenses for Personnel in 2010 are \$19,400 (1.3%) lower than the 2009 budget. The decrease has four major components: the elimination of part-time help line of \$7,000, decrease in worker's compensation of \$3,900, decrease in the retiree health supplement of \$6,500, and reduction of the reserve for sabbaticals of \$2,000. Summer internships for high school and college students are funded from the Bishop's Annual Appeal. Worker's compensation costs have decreased due to participation in a group program through the Ohio Council of Churches.

Over 11% percent (\$178,340) of the \$1,503,680 is funded by reimbursement from diocesan trusts administered by diocesan staff, providing accounting and grant making services.

The budget includes funding for Bishop Hollingsworth, 7 full-time program staff positions, 7 full-time support staff positions, a part-time planned giving consultant, three part-time assisting bishops and two part-time positions in the archives. There is no increase in the number of positions in the 2010 budget.

Personnel expenses are 43.6% of the Diocesan budget in 2010, as compared to 41.9% of the 2009 budget. The ratio of personnel expenses to the total budget is lower than the same ratio for many large and small parishes, which report a ratio of 50-60% or more. Many service organizations also report a higher ratio.

The total provides for salary, pension, health and dental insurance, workers compensation insurance, and long-term disability and life insurance for lay employees approximately equivalent to that provided to clergy. It also provides for training, continuing education, and sabbatical assistance for lay and clergy and continues payment of a supplement that assists retired diocesan employees in meeting their rising expenses for health insurance costs.

#### **Travel**

The 2010 budget for travel expenses represents reimbursement for all business-related travel expenses of the Diocesan staff. The \$76,000 represents a \$4,000 decrease from 2009, which includes a reduction in the mileage reimbursement for lay volunteers, which is estimated at \$3,000, and an additional \$1,000 reduction in staff travel reimbursements.

#### **Office Equipment and Supplies**

Office expenses, including our share of the operating expenses of Trinity Commons, are \$278,844 in 2010, a decrease of \$1,706 from 2009. The operating costs of Trinity Commons increase by two percent (\$4,544) and are offset by a \$1,250 reduction in telephone expenses, and a \$5,000 reduction in the reserve for capital improvements for Trinity Commons. Since none of the existing reserve has been spent, additions to the reserve were not deemed necessary in 2010. All other items remain at their 2009 levels.

Office equipment and supplies are \$11,100 in the 2010 budget. This amount is \$7,000 lower than the 2009 level, primarily from reduction to the computer replacement reserve. The budget includes funding for postage, copies, computer software, supplies and network maintenance; and office supplies and stationery. In 2010, all of these costs are funded from the operating budget.

# **Appendix V**

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## **2009 Selected Financial Data**

# Parochial Report Data

2009 Parochial Report Data	Attendance			Services Held										Baptisms and Confirmations			
	Baptized Members	Communicants in Good Standing	Communicants in Good Standing Under 16	Average Sunday Attendance	Easter	Weekend Eucharists	Weekday Eucharists	Private Eucharists	Marriages	Burials	Baptisms 16 and over	Baptisms under 16	Confirmations 16 and over	Confirmations under 16	Received by a Bishop	Sunday School Students	
Akron, Church of Our Saviour	264	215	26	84	229	71	28	0	0	2	1	1	6	0	2	25	
Akron, St. Andrew's Church	57	43	3	33	69	51	10	3	0	3	2	4	0	0	0	9	
Akron, St. Paul's Church	2167	1448	344	377	921	179	101	50	4	29	1	7	2	19	0	112	
Akron, St. Philip's Church	93	93	6	39	64	0	0	0	0	3	0	3	0	0	0	0	
Alliance, Trinity Church	86	58	3	29	59	47	3	1	1	0	0	2	0	0	0	2	
Ashland, St. Matthew's Church	72	73	6	38	47	52	2	26	0	1	0	1	0	0	0	6	
Ashtabula, St. Peter's Church	236	230	15	94	146	102	0	12	2	3	2	1	6	0	0	8	
Barberton, St. Andrew's Church	155	109	5	55	130	111	14	31	0	13	0	1	0	0	1	5	
Bellefontaine, Church of the Holy Trinity	60	36	4	23	43	49	1	3	1	2	0	0	0	0	0	0	
Bellevue, St. Paul's Church	88	64	22	25	70	53	5	11	0	2	0	1	0	2	0	10	
Berea, St. Thomas's Church	308	256	43	131	215	180	54	111	0	5	1	3	3	0	0	15	
Boardman, St. James's Church	153	131	12	87	114	83	7	37	2	3	4	1	1	0	1	9	
Bowling Green, St. John the Baptist's Church	40	35	1	22	39	39	3	0	0	1	0	0	2	1	0	0	
Brecksville, St. Matthew's Church	252	209	48	103	155	3	3	4	1	1	0	3	0	0	0	46	
Brunswick, St. Patrick's Church	88	88	26	46	86	49	3	1	0	1	0	1	3	0	0	21	
Canton, St. Mark's Church	226	247	21	150	284	102	25	11	1	4	0	0	0	0	2	35	
Canton, St. Paul's Church	213	128	9	87	189	61	23	86	1	11	0	1	5	0	0	9	
Chagrin Falls, St. Martin's Church	1009	599	85	184	369	129	39	10	0	4	0	4	4	0	0	5	
Chardon, St. Luke's Church																	
Cleveland, St. Andrew's Church	160	152	8	67	130	3	14	9	0	7	0	1	0	0	0	10	
Cleveland, St. Luke's Church	127	98	28	78	142	51	4	0	0	1	1	0	10	0	3	101	
Cleveland, St. Mark's Church	29	29	1	19	20	50	2	9	0	0	1	0	0	0	0	0	
Cleveland, Trinity Cathedral	878	846	118	409	757	160	84	24	5	9	11	9	14	0	8	130	
Cleveland Heights, St. Alban's Church	22	20	0	22	33	36	3	6	0	3	0	1	0	0	0	0	
Cleveland Heights, St. Paul's Church	2141	2141	409	446	1347	212	91	59	7	22	2	16	6	14	3	496	
Coshocton, Trinity Church	74	66	4	27	60	50	6	12	1	2	1	1	0	0	0	4	
Cuyahoga Falls, St. John's Church	121	87	11	72	132	96	7	120	2	6	0	2	4	0	2	10	
Defiance, Grace Church	73	59	4	38	7	39	5	14	1	3	0	1	0	0	0	0	
East Liverpool, St. Stephen's Church	120	80	4	42	89	1824	510	0	0	7	1	0	0	0	0	4	
Elyria, St. Andrew's Church	264	195	19	85	158	102	28	35	1	2	1	1	4	2	1	24	
Euclid, Church of the Epiphany	330	203	24	117	183	69	25	35	0	2	0	2	0	0	2	24	
Findlay, Trinity Church	243	243	9	87	147	106	43	0	1	6	0	1	0	3	0	4	
Fremont, St. Paul's Church	194	70	14	47	80	54	4	15	0	4	0	0	2	1	0	10	
Gambier, Harcourt Parish	113	98	30	77	326	66	62	7	1	3	0	1	0	0	0	25	
Gates Mills, St. Christopher by the River Church	233	195	30	81	236	102	17	14	4	9	0	1	4	0	0	25	
Geneva, Christ Church	88	80	30	43	75	27	4	5	0	2	0	1	0	0	0	32	
Hudson, Christ Church	786	600	176	253	606	149	6	116	2	4	2	16	2	11	1	190	
Huron, Christ Church	289	287	4	54	83	55	3	144	1	3	2	1	0	0	0	8	

	Services Held										Baptisms and Confirmations				
	Attendance														
	Communicants in Good Standing	Communicants in Good Standing Under 16	Average Sunday Attendance	Easter	Weekend Eucharists	Weekday Eucharists	Private Eucharists	Marriages	Burials	Baptisms 16 and over	Baptisms under 16	Confirmations 16 and over	Confirmations under 16	Received by a Bishop	Sunday School Students
2009 Parochial Report Data															
Kent, Christ Church	232	158	76	152	98	4	12	1	14	0	1	0	0	0	21
Kirtland Hills, St. Hubert's Church	380	233	83	202	105	33	1	2	5	0	4	0	0	0	20
Lakewood, Church of the Ascension	140	92	7	128	97	49	18	4	4	0	5	0	0	0	10
Lakewood, St. Peter's Church	515	515	185	414	102	66	110	0	14	1	12	0	0	0	35
Lisbon, Holy Trinity Church	45	30	0	28	51	3	0	1	1	0	0	0	0	1	0
Lorain, Church of the Redeemer	193	160	10	137	90	5	52	1	4	0	4	3	2	0	12
Lyndhurst, Church of the Good Shepherd	279	128	15	197	49	6	0	1	3	0	0	0	0	0	17
Macedonia, St. Timothy's Church	300	198	21	105	98	7	55	1	5	0	4	0	0	0	28
Mansfield, Grace Church	353	296	34	194	95	37	101	3	5	2	3	2	0	0	9
Marion, St. Paul's Church	108	29	1	29	52	5	72	1	2	0	0	0	0	0	0
Massillon, St. Timothy's Church	442	309	112	216	105	59	56	5	10	1	2	5	5	0	27
Maumee, St. Paul's Church	629	629	125	211	138	52	150	1	8	0	7	0	1	1	55
Mayfield Village, St. Bartholomew Church	110	100	10	102	97	15	17	0	14	0	1	3	0	1	2
Medina, St. Paul's Church	492	396	50	261	145	53	47	4	7	3	4	1	1	0	25
Mentor, St. Andrew Episcopal Church	229	197	25	142	156	57	106	5	9	0	6	0	0	0	55
Mount Vernon, St. Paul's Church	165	100	8	103	88	86	96	1	1	1	0	2	0	2	27
Napoleon, St. John the Baptist's Church															
New Philadelphia, Trinity Church	115	115	10	84	94	50	13	2	2	0	2	4	0	0	9
Niles, St. Luke's Church	125	112	16	143	50	8	2	1	2	2	0	0	0	0	16
Norwalk, St. Paul's Church	69	53	10	69	49	29	5	0	4	0	1	2	0	2	8
Oberlin, Christ Church	131	123	23	131	115	49	39	0	4	0	2	0	0	1	18
Oregon, St. Paul's Church															
Painesville, St. James's Church	266	222	28	207	96	42	3	3	4	2	2	0	0	0	20
Parma, All Saints Church	255	255	30	140	86	8	80	1	4	0	1	0	0	0	15
Perrysburg, St. Timothy's Church	331	330	35	205	95	2	0	0	5	0	1	0	0	0	35
Port Clinton, St. Thomas's Church	53	39	0	45	35	13	32	1	2	0	0	0	0	0	0
Put-in-Bay, St. Paul's Church	190	50	7	122	78	1	2	1	2	0	3	0	0	0	7
Ravenna, Grace Church	201	201	29	128	97	20	24	3	4	0	2	4	2	1	18
Salem, Church of Our Saviour	52	27	0	39	28	3	4	2	1	0	2	0	0	0	0
Sandusky, Grace Church	215	200	10	212	104	50	53	2	8	0	0	0	0	0	8
Shaker Heights, Christ Church	260	249	55	260	105	33	23	1	7	0	3	0	0	0	72
Shelby, St. Mark's Church	91	91	15	63	44	3	19	1	11	0	1	0	0	0	10
Sidney, St. Mark's Church	42	42	14	62	52	0	0	0	0	1	5	0	0	0	7
Stuebenville, St. Paul's Church	111	90	0	100	52	0	512	1	7	0	7	0	0	0	0
Stuebenville, St. Stephen's Church	114	114	18	71	52	0	0	0	0	0	1	4	1	5	18
Tiffin, Old Trinity Church															
Toledo, All Saints Church	177	177	29	208	100	11	59	1	7	0	3	1	0	0	8
Toledo, St. Andrew's Church															



	Attendance			Services Held					Baptisms and Confirmations					
	Communicants in Good Standing	Communicants in Good Standing Under 16	Average Sunday Attendance	Easter	Weekend Eucharists	Weekday Eucharists	Private Eucharists	Marriages	Burials	Baptisms 16 and over	Baptisms under 16	Confirmations 16 and over	Confirmations under 16	Received by a Bishop
2009 Parochial Report Data														
Baptized Members	159	168	92	137	109	5	12	1	4	0	0	0	0	3
Toledo, St. Mark's Church	316	209	128	235	88	33	34	2	4	0	5	0	0	0
Toledo, St. Matthew's Church	507	419	191	323	137	22	25	2	12	0	3	0	0	0
Toledo, St. Michael's-in-the-Hills Church	187	108	78	126	69	3	23	1	5	1	1	0	0	0
Toledo, Trinity Church	149	145	74	136	51	32	18	1	2	0	0	3	0	0
Uniontown, New Life Episcopal Church	59	59	52	68	54	4	25	1	1	0	3	1	0	0
Wadsworth, St. Mark's Church	356	356	102	200	90	44	19	0	10	0	2	0	0	0
Warren, Christ Church	140	137	76	140	90	3	26	2	1	0	0	0	0	0
Westlake, Church of the Advent	95	95	59	121	103	24	50	3	2	1	3	1	0	0
Willoughby, Grace Church	250	248	100	251	94	50	27	3	2	1	2	1	0	4
Wooster, St. James's Church														
Youngstown, St. Augustine's														
Youngstown, St. John's Church	521	328	99	203	100	20	149	1	4	0	0	0	0	0

## Assessment

## Payment

2009 Parochial Report Data	Pledging Units	Amount Pledged	Pledge and Plate	Normal Operating Income	Assistance from Diocese	Total Operating Revenue	Total Revenue	To Diocese	Operating Expenses	Total Expenses
Akron, Church of Our Saviour	64	\$156,109.00	\$183,351.00	\$407,163.00	\$0.00	\$407,163.00	\$447,401.00	\$48,845.00	\$407,213.00	\$446,430.00
Akron, St. Andrew's Church	19	\$28,000.00	\$33,683.00	\$52,340.00	\$0.00	\$52,340.00	\$54,281.00	\$4,652.00	\$52,340.00	\$54,531.00
Akron, St. Paul's Church	303	\$621,161.00	\$741,887.00	\$1,088,474.00	\$0.00	\$1,088,474.00	\$1,413,511.00	\$175,436.00	\$1,088,474.00	\$1,515,747.00
Akron, St. Philip's Church	32	\$51,320.00	\$42,790.00	\$42,790.00	\$0.00	\$42,790.00	\$48,717.00	\$4,466.00	\$42,790.00	\$46,112.00
Alliance, Trinity Church	14	\$15,892.00	\$31,795.59	\$50,796.82	\$0.00	\$50,796.82	\$53,431.88	\$3,578.25	\$53,325.80	\$54,424.71
Ashland, St. Matthew's Church	26	\$49,096.00	\$58,023.00	\$59,712.00	\$0.00	\$59,712.00	\$64,570.00	\$6,280.00	\$60,212.00	\$60,212.00
Ashtabula, St. Peter's Church	59	\$111,844.00	\$144,286.00	\$148,736.00	\$0.00	\$148,736.00	\$161,869.00	\$21,103.00	\$148,255.00	\$161,388.00
Barberton, St. Andrew's Church	45	\$70,569.00	\$73,124.00	\$125,666.00	\$0.00	\$125,666.00	\$125,666.00	\$13,146.00	\$125,666.00	\$125,666.00
Bellevue, Church of the Holy Trinity	20	\$29,250.00	\$29,241.00	\$34,862.00	\$0.00	\$34,862.00	\$36,533.00	\$3,672.00	\$34,862.00	\$34,862.00
Bellevue, St. Paul's Church	11	\$18,676.00	\$29,677.00	\$54,852.00	\$0.00	\$54,852.00	\$54,852.00	\$5,085.00	\$54,940.00	\$54,940.00
Berea, St. Thomas's Church	112	\$180,525.00	\$179,362.00	\$242,941.00	\$0.00	\$242,941.00	\$284,122.00	\$27,877.00	\$242,941.00	\$269,985.00
Boardman, St. James's Church	56	\$96,192.00	\$104,588.00	\$161,334.00	\$0.00	\$161,334.00	\$165,474.00	\$15,538.00	\$161,333.00	\$174,677.00
Bowling Green, St. John the Baptist's Church	18	\$44,680.00	\$43,075.30	\$49,074.22	\$60,975.03	\$110,049.25	\$119,958.92	\$5,461.08	\$110,549.25	\$122,017.25
Brecksville, St. Matthew's Church	46	\$108,742.00	\$136,239.00	\$158,381.00	\$0.00	\$158,381.00	\$187,710.00	\$18,090.00	\$158,381.00	\$171,260.00
Brunswick, St. Patrick's Church	25	\$36,544.00	\$44,999.00	\$44,999.00	\$0.00	\$44,999.00	\$81,020.00	\$5,280.00	\$44,999.00	\$51,183.00
Canton, St. Mark's Church	133	\$238,302.00	\$240,831.00	\$262,529.00	\$0.00	\$262,529.00	\$322,158.00	\$27,593.00	\$262,529.00	\$296,135.00
Canton, St. Paul's Church	61	\$128,030.00	\$169,771.00	\$254,485.00	\$0.00	\$254,485.00	\$259,485.00	\$28,612.00	\$253,985.00	\$263,354.00
Chagrin Falls, St. Martin's Church	0	\$0.00	\$292,968.00	\$375,323.00	\$0.00	\$375,323.00	\$1,238,275.00	\$47,052.00	\$375,127.00	\$1,579,465.00
Chardon, St. Luke's Church	40	\$89,929.00	\$88,913.00	\$106,847.00	\$2,000.00	\$108,847.00	\$124,413.00	\$10,402.00	\$109,347.00	\$120,581.00
Cleveland, St. Andrew's Church	34	\$94,000.00	\$93,558.00	\$97,180.00	\$0.00	\$97,180.00	\$222,449.00	\$21,800.00	\$222,449.00	\$229,094.00
Cleveland, St. Luke's Church	15	\$82,220.00	\$93,558.00	\$97,180.00	\$0.00	\$97,180.00	\$102,087.00	\$8,621.00	\$97,180.00	\$121,424.00
Cleveland, St. Mark's Church	13	\$30,300.00	\$36,250.00	\$60,258.00	\$0.00	\$60,258.00	\$62,082.00	\$6,584.00	\$60,258.00	\$60,943.00
Cleveland, Trinity Cathedral	305	\$500,896.00	\$540,247.00	\$1,677,699.00	\$0.00	\$1,677,699.00	\$1,875,706.00	\$257,340.00	\$1,677,700.00	\$2,174,638.00
Cleveland Heights, St. Alban's Church	20	\$18,000.00	\$18,743.00	\$18,743.00	\$0.00	\$18,743.00	\$18,915.00	\$2,266.00	\$20,554.00	\$21,651.00
Cleveland Heights, St. Paul's Church	463	\$1,333,778.00	\$1,458,646.00	\$1,665,391.00	\$0.00	\$1,665,391.00	\$2,672,540.00	\$253,000.00	\$1,665,391.00	\$2,253,316.00
Coshocton, Trinity Church	32	\$60,000.00	\$64,154.00	\$100,635.00	\$0.00	\$100,635.00	\$111,110.00	\$10,913.00	\$101,135.00	\$102,194.00
Cuyahoga Falls, St. John's Church	69	\$151,823.00	\$176,836.00	\$214,980.00	\$0.00	\$214,980.00	\$288,006.00	\$26,767.00	\$214,981.00	\$313,450.00
Defiance, Grace Church	36	\$28,730.00	\$49,178.00	\$68,878.00	\$0.00	\$68,878.00	\$73,335.00	\$5,154.00	\$68,878.00	\$78,392.00
East Liverpool, St. Stephen's Church	0	\$0.00	\$51,160.00	\$98,807.00	\$0.00	\$98,807.00	\$122,239.00	\$9,093.00	\$98,807.00	\$103,713.00
Elyria, St. Andrew's Church	54	\$142,608.00	\$152,613.00	\$206,737.00	\$0.00	\$206,737.00	\$241,703.00	\$22,943.00	\$206,804.00	\$309,546.00
Euclid, Church of the Epiphany	74	\$131,022.00	\$140,909.00	\$175,721.00	\$0.00	\$175,721.00	\$186,721.00	\$16,131.00	\$175,721.00	\$181,413.00
Findlay, Trinity Church	48	\$116,780.00	\$139,076.00	\$147,967.00	\$0.00	\$147,967.00	\$161,225.00	\$15,834.00	\$147,967.00	\$151,412.00
Fremont, St. Paul's Church	46	\$80,760.00	\$98,505.00	\$188,992.00	\$0.00	\$188,992.00	\$192,943.00	\$21,107.00	\$188,992.00	\$195,995.00
Gambier, Harcourt Parish	59	\$112,430.00	\$112,894.00	\$159,533.00	\$0.00	\$159,533.00	\$182,044.00	\$16,336.00	\$159,490.00	\$185,789.00
Gates Mills, St. Christopher by the River Church	22	\$39,000.00	\$47,796.11	\$48,331.14	\$0.00	\$48,331.14	\$60,397.18	\$4,835.70	\$48,367.94	\$58,655.03
Geneva, Christ Church										

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2009 Parochial Report Data	Pledging Units	Amount Pledged	Pledge and Plate	Normal Operating Income	Assistance from Diocese	Total Operating Revenue	Total Revenue	To Diocese	Operating Expenses	Total Expenses
Tiffin, Old Trinity Church	50	\$95,650.00	\$137,103.00	\$158,880.00	\$0.00	\$158,880.00	\$163,138.00	\$16,520.00	\$159,379.00	\$162,513.00
Toledo, All Saints Church	70	\$94,879.00	\$100,092.81	\$353,568.64	\$0.00	\$353,568.64	\$380,381.83	\$48,828.16	\$353,568.64	\$360,308.45
Toledo, St. Andrew's Church	63	\$243,125.00	\$286,511.00	\$290,977.00	\$0.00	\$290,977.00	\$301,013.00	\$35,083.00	\$291,477.00	\$301,513.00
Toledo, St. Matthew's Church	178	\$414,779.00	\$389,273.00	\$439,113.00	\$0.00	\$439,113.00	\$487,421.00	\$60,372.00	\$439,113.00	\$528,476.00
Toledo, St. Michael's-in-the-Hills Church	61	\$137,515.00	\$151,332.00	\$346,323.00	\$0.00	\$346,323.00	\$373,000.00	\$51,729.00	\$346,323.00	\$361,032.00
Uniontown, Trinity Church	45	\$87,686.00	\$99,673.00	\$114,439.00	\$0.00	\$114,439.00	\$136,207.00	\$6,332.00	\$114,440.00	\$123,846.00
Uniontown, New Life Episcopal Church	26	\$39,180.00	\$42,517.00	\$66,903.00	\$0.00	\$66,903.00	\$83,880.00	\$7,674.00	\$66,903.00	\$75,459.00
Wadsworth, St. Mark's Church	97	\$126,238.00	\$132,532.00	\$275,334.00	\$0.00	\$275,334.00	\$396,274.00	\$32,983.00	\$275,334.00	\$396,274.00
Warren, Christ Church	42	\$16,780.00	\$112,382.00	\$112,382.00	\$0.00	\$112,382.00	\$204,022.00	\$10,284.00	\$112,382.00	\$145,309.00
Westlake, Church of the Advent	53	\$68,854.00	\$76,791.60	\$103,072.42	\$0.00	\$103,072.42	\$278,844.31	\$10,987.93	\$103,072.42	\$198,290.93
Willoughby, Grace Church	82	\$171,886.00	\$219,809.00	\$245,364.00	\$0.00	\$245,364.00	\$281,258.00	\$27,693.00	\$245,364.00	\$263,429.00
Wooster, St. James's Church										
Youngstown, St. Augustine's Church										
Youngstown, St. John's Church	94	\$226,000.00	\$192,657.00	\$355,306.00	\$0.00	\$355,306.00	\$457,521.00	\$55,076.00	\$355,306.00	\$451,251.00

**Episcopal Diocese of Ohio  
Operating Fund - Statement of Actual vs. Budget For Year 2009**

		<u>Operating</u>	<u>Special Funds</u>	<u>Total Actual</u>	<u>Annual Budget</u>
RECEIPTS					
SUPPORT FROM CONGREGATIONS					
0101-4105-01	Assessment Income (current year)	\$2,253,350.59	\$0.00	\$2,253,350.59	\$2,400,000.00
0101-4106-01	Assessment Income (prior year)	\$128,567.42	\$0.00	\$128,567.42	\$100,000.00
0101-4107-01	Less: Assessment Credits - Energy Assistance	\$1,624.70	\$0.00	\$1,624.70	\$0.00
TOTAL SUPPORT FROM CONGREGATIONS		<u>\$2,380,293.31</u>	<u>\$0.00</u>	<u>\$2,380,293.31</u>	<u>\$2,500,000.00</u>
ENDOWMENT INCOME					
0101-4110-02	Endowment-Episcopate (Distrib.)	\$177,493.68	\$0.00	\$177,493.68	\$178,028.40
0101-4120-02	Endowment-Missions (Distrib)	\$51,877.23	\$0.00	\$51,877.23	\$50,638.08
0101-4130-02	Endowment-Custodial (Distrib.)	\$575.28	\$0.00	\$575.28	\$577.08
0101-4140-02	Endowment-Lay Pension	\$8,262.24	\$0.00	\$8,262.24	\$8,287.08
0101-4150-02	Endowment - Bishop's Office	\$40,000.00	\$0.00	\$40,000.00	\$40,000.00
0101-4155-02	Endowment Income - Legacy endowments	\$2,811.49	\$0.00	\$2,811.49	\$2,656.78
0101-4160-02	Endowment - ECSF - Administration (Actual)	\$37,793.16	\$0.00	\$37,793.16	\$37,651.32
TOTAL ENDOWMENT INCOME		<u>\$318,813.08</u>	<u>\$0.00</u>	<u>\$318,813.08</u>	<u>\$317,838.74</u>
TOTAL INVESTMENT INCOME - OTHER					
0101-4120-04	Distribution JIF-General Funds	\$113,118.00	\$0.00	\$113,118.00	\$113,700.02
0101-4125-04	Distribution JIF-Unrestricted Custodial Accts	\$22,562.39	\$0.00	\$22,562.39	\$24,534.84
TOTAL INVESTMENT INCOME		<u>\$135,680.39</u>	<u>\$0.00</u>	<u>\$135,680.39</u>	<u>\$138,234.86</u>
FEES RECEIVED FOR ADMINISTRATIVE SERVICES					
0101-4103-06	Darnell Adm. Fees	\$3,360.00	\$0.00	\$3,360.00	\$3,360.00
0101-4108-06	Brayton Administration Fees	\$9,900.00	\$0.00	\$9,900.00	\$9,900.00
0101-4109-06	Church Home Admin. Fee	\$36,000.00	\$0.00	\$36,000.00	\$36,000.00
0101-4111-06	Holy Cross House - Admin. Fee	\$6,579.96	\$0.00	\$6,579.96	\$6,580.00
0101-4115-06	Joint Investment Fund Admin. Fee	\$73,200.00	\$0.00	\$73,200.00	\$73,200.00
0101-4118-06	BLF Loans and Grants Administrative Fee	\$17,700.00	\$0.00	\$17,700.00	\$17,700.00
0101-4120-06	Other Fees & Reimbursements	\$5.00	\$0.00	\$5.00	\$0.00
0101-4123-06	Cooper Administration Fees	\$660.00	\$0.00	\$660.00	\$660.00
0101-4124-06	Miller Funds Administrative Fee	\$19,800.00	\$0.00	\$19,800.00	\$19,800.00
0101-4126-06	Education Funds - Hornby Adm. Fees	\$4,400.04	\$0.00	\$4,400.04	\$4,400.00
TOTAL FEES RECEIVED FOR ADMINISTRATIVE SERVICES		<u>\$171,605.00</u>	<u>\$0.00</u>	<u>\$171,605.00</u>	<u>\$171,600.00</u>
OTHER RECEIPTS					
0101-4120-08	Other Income	\$2,229.87	\$0.00	\$2,229.87	\$0.00
0101-4310-08	Grants Received for Operating items	\$0.00	\$0.00	\$0.00	\$2,000.00
0101-4316-08	Grants - Foundations	\$2,640.00	\$0.00	\$2,640.00	\$3,000.00
TOTAL OTHER RECEIPTS		<u>\$4,869.87</u>	<u>\$0.00</u>	<u>\$4,869.87</u>	<u>\$5,000.00</u>
FROM SPECIAL FUNDS					
3201-4110-90	From Special Funds-BLF Loans and Grants	\$0.00	\$129,036.00	\$129,036.00	\$129,036.00
3303-4110-90	From Special Funds-BLF Discretionary Fund	\$0.00	\$0.00	\$0.00	\$1,000.00
3338-4110-90	From Special Funds - Youth Scholarship Fund	\$0.00	\$0.00	\$0.00	\$2,000.00
3376-4110-90	From Legacy Endowments-Arthur B. Williams, Jr. Fund	\$0.00	\$11,186.87	\$11,186.87	\$14,000.00
3405-4110-90	From Special Funds - Bishop's Discretionary Fund	\$0.00	\$0.00	\$0.00	\$5,000.00
3408-4110-90	From Special Funds - Bishop's Appeal	\$0.00	\$78,549.62	\$78,549.62	\$61,300.00
3605-4110-90	From Special Funds-Custodial JIF	\$0.00	\$64,191.84	\$64,191.84	\$90,000.00
3705-4110-90	From Special Funds-Education Funds	\$0.00	\$94,501.09	\$94,501.09	\$136,600.00
TOTAL FROM SPECIAL FUNDS		<u>\$0.00</u>	<u>\$377,465.42</u>	<u>\$377,465.42</u>	<u>\$438,936.00</u>
TOTAL RECEIPTS		<u>\$3,011,261.65</u>	<u>\$377,465.42</u>	<u>\$3,388,727.07</u>	<u>\$3,571,609.60</u>
EXPENSES					
OFFICE OF MINISTRY					
CLERGY FORMATION					
0101-5180-0	Ordination Process	\$13,133.28	\$0.00	\$13,133.28	\$17,000.00
3408-5181-0	Post-Ordination Internships	\$0.00	\$44,200.04	\$44,200.04	\$27,300.00
3408-5184-0	Summer Seminarian Internships	\$0.00	\$8,970.85	\$8,970.85	\$9,000.00
3705-5160-0	Miller-Scholarships/Formation & Train	\$0.00	\$16,793.81	\$16,793.81	\$42,000.00
3705-5165-0	Miller-Recently Ordained Clergy Program	\$0.00	\$1,237.92	\$1,237.92	\$0.00

		Operating	Special Funds	Total Actual	Annual Budget
3705-5170-0	Post-Ordination Internships	\$0.00	\$0.00	\$0.00	\$17,500.00
3705-5175-0	Misc. Educ. Fnds-Deacon Formation Program	\$0.00	\$15,722.50	\$15,722.50	\$15,000.00
3705-5182-0	Post - Ordination Internships	\$0.00	\$20,074.32	\$20,074.32	\$0.00
TOTAL CLERGY FORMATION		\$13,133.28	\$106,999.44	\$120,132.72	\$127,800.00
CLERGY SUPPORT					
0101-5237-0	Clergy & Lay Professional Families Program	\$435.82	\$0.00	\$435.82	\$500.00
0101-5240-0	Clergy Group Life Insurance	\$67.15	\$0.00	\$67.15	\$0.00
0101-5315-0	Honorarium -Chaplain for Spouse	\$0.00	\$0.00	\$0.00	\$1,000.00
3605-5280-0	D&ICF-Counseling/Clergy & Families	\$0.00	\$7,985.00	\$7,985.00	\$12,000.00
3605-5285-0	D&ICF-Health Ins. Prem./Spec. Circumstances	\$0.00	\$1,758.30	\$1,758.30	\$0.00
3705-5235-0	Fresh Start	\$0.00	\$1,948.50	\$1,948.50	\$2,500.00
3705-5242-0	Post Fresh Start	\$0.00	\$0.00	\$0.00	\$1,000.00
TOTAL CLERGY SUPPORT		\$502.97	\$11,691.80	\$12,194.77	\$17,000.00
CLERGY DEVELOPMENT					
0101-5338-0	Commission on Ministry	\$0.00	\$0.00	\$0.00	\$950.00
3705-5335-0	Miller-Clergy Days	\$0.00	\$878.34	\$878.34	\$600.00
3705-5336-0	Lay Professional Day	\$0.00	\$0.00	\$0.00	\$1,000.00
3705-5380-0	Educ. Fnds-Clergy Cont. Education Grants	\$0.00	\$12,181.16	\$12,181.16	\$15,000.00
3705-5381-0	Educ.Fnds-Lay Cont. Education Grants	\$0.00	\$2,744.78	\$2,744.78	\$4,000.00
3705-5384-0	Clergy Conferences	\$0.00	\$16,124.68	\$16,124.68	\$20,000.00
3705-5385-0	Miller-Clergy Professional Ed. Prog.	\$0.00	\$0.00	\$0.00	\$1,000.00
TOTAL CLERGY DEVELOPMENT		\$0.00	\$31,928.96	\$31,928.96	\$42,550.00
Winter Gathering					
0101-5350-0	Winter Gathering	\$1,000.62	\$0.00	\$1,000.62	\$1,000.00
3705-5350-0	Winter Gathering	\$0.00	\$8,360.64	\$8,360.64	\$12,000.00
Total Winter Gathering		\$1,000.62	\$8,360.64	\$9,361.26	\$13,000.00
CLERGY DEPLOYMENT					
0101-5415-0	Search Exp. Assistance/Parish	\$135.00	\$0.00	\$135.00	\$4,000.00
0101-5420-0	Interim Team Training	\$381.38	\$0.00	\$381.38	\$500.00
0101-5425-0	Background Checks	\$970.00	\$0.00	\$970.00	\$950.00
TOTAL CLERGY DEPLOYMENT		\$1,486.38	\$0.00	\$1,486.38	\$5,450.00
PLANNING & ADMINISTRATION					
0101-5510-0	Admin. Exp./Ordained Ministry	\$4,898.92	\$0.00	\$4,898.92	\$3,800.00
0101-5515-0	Admin. Exp./Deployment	\$2,100.01	\$0.00	\$2,100.01	\$3,210.00
TOTAL CLERGY ADMIN./PLANNINGS		\$6,998.93	\$0.00	\$6,998.93	\$7,010.00
TOTAL FOR OFFICE FOR MINISTRY		\$23,122.18	\$158,980.84	\$182,103.02	\$212,810.00
OFFICE FOR CONGREGATIONS AND CHRISTIAN FORMATION					
0101-5105-10	Administration	\$11,276.86	\$0.00	\$11,276.86	\$6,000.00
AID TO CONGREGATIONS					
0101-5207-1	ESMTOS (Episcopal Shared Ministry - Trinity and Our Saviour)	\$20,000.04	\$0.00	\$20,000.04	\$20,000.00
0101-5250-1	Episcopal West Side Shared Ministries	\$30,999.96	\$0.00	\$30,999.96	\$31,000.00
0101-5251-1	St. Thomas, Port Clinton	\$5,000.04	\$0.00	\$5,000.04	\$5,000.00
0101-5252-1	St. Stephen's Episcopal Shared Ministry	\$5,000.04	\$0.00	\$5,000.04	\$5,000.00
0101-5254-1	St. Paul's, Norwalk (formerly North Central Episcopal SM)	\$5,000.04	\$0.00	\$5,000.04	\$5,000.00
0101-5268-1	Northern Miami Valley Episcopal Cluster	\$6,999.96	\$0.00	\$6,999.96	\$7,000.00
0101-5270-1	Anticipated Opportunities	\$2,500.00	\$0.00	\$2,500.00	\$5,000.00
3376-5250-1	Episcopal West Side Shared Ministry	\$0.00	\$9,000.00	\$9,000.00	\$9,000.00
3605-5238-1	St. John's, Bowling Green	\$0.00	\$32,500.00	\$32,500.00	\$30,000.00
3605-5305-1	New Work: St. Patrick, Brunswick	\$0.00	\$20,000.04	\$20,000.04	\$20,000.00
TOTAL AID TO CONGREGATIONS		\$75,500.08	\$61,500.04	\$137,000.12	\$137,000.00
NEW WORK					
0101-5307-1	Evangelism	\$2,000.00	\$0.00	\$2,000.00	\$2,000.00
0101-5308-1	New Initiatives Research	\$328.65	\$0.00	\$328.65	\$2,000.00
TOTAL NEW WORK		\$2,328.65	\$0.00	\$2,328.65	\$4,000.00

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		Operating	Special Funds	Total Actual	Annual Budget
0101-5405-10	Ministry & Growth Grants	\$23,287.93	\$0.00	\$23,287.93	\$25,000.00
0101-5410-10	Percept Demographics	\$7,412.00	\$0.00	\$7,412.00	\$7,500.00
0101-5402-10	Comprehensive Revitalization Program	\$0.00	\$0.00	\$0.00	\$2,000.00
0101-5411-10	Natural Church Development	\$17,233.32	\$0.00	\$17,233.32	\$15,000.00
3605-5402-10	Comprehensive Revitalization Program	\$0.00	\$0.00	\$0.00	\$28,000.00
EDUCATION FOR DEVELOPMENT					
0101-5605-1	Winter Convocation	\$4,718.83	\$0.00	\$4,718.83	\$15,000.00
0101-5610-1	Education for Ministry	\$3,219.92	\$0.00	\$3,219.92	\$1,500.00
0101-5615-1	Education for Congregations	\$2,909.22	\$0.00	\$2,909.22	\$8,000.00
0101-5616-1	Education for CDC Members/Consultants	\$620.05	\$0.00	\$620.05	\$1,000.00
0101-5618-1	Travel Expense for Parish Consultant Program	\$764.44	\$0.00	\$764.44	\$1,000.00
0101-5630-1	Resource Center-Materials/Supp	\$3,803.44	\$0.00	\$3,803.44	\$4,000.00
TOTAL EDUCATION FOR DEVELOPMENT		\$16,035.90	\$0.00	\$16,035.90	\$30,500.00
CHRISTIAN FORMATION					
0101-5611-1	Parish Based College Work Grants	\$28,000.00	\$0.00	\$28,000.00	\$25,750.00
0101-5613-1	Ministry to Young People-Program	\$15,562.63	\$0.00	\$15,562.63	\$13,000.00
0101-5619-1	Leadership Development - Ministry for All Ages	\$4,482.07	\$0.00	\$4,482.07	\$4,800.00
0101-5637-1	Kenyon Summer Conference	\$10,000.00	\$0.00	\$10,000.00	\$5,000.00
3338-5613-1	Youth Scholarships	\$0.00	\$0.00	\$0.00	\$2,000.00
TOTAL CHRISTIAN FORMATION		\$58,044.70	\$0.00	\$58,044.70	\$50,550.00
TOTAL FOR OFFICE FOR CONGREGATIONS AND CHRISTIAN FORMATION		\$211,119.44	\$61,500.04	\$272,619.48	\$305,550.00
DIOCESAN, EPISCOPAL CHURCH AND ANGLICAN COMMUNION RESP.					
GENERAL CHURCH					
0101-5105-1	Assessment	\$612,200.04	\$0.00	\$612,200.04	\$612,200.00
0101-5110-1	Provincial Synod	\$6,347.00	\$0.00	\$6,347.00	\$6,735.00
0101-5113-1	Travel to Provincial Education Events	\$0.00	\$0.00	\$0.00	\$1,000.00
0101-5115-1	Travel to Provincial Synod	\$57.60	\$0.00	\$57.60	\$750.00
TOTAL GENERAL CHURCH		\$618,604.64	\$0.00	\$618,604.64	\$620,685.00
DIOCESE OF OHIO					
0101-5205-1	Diocesan Convention	\$15,009.18	\$0.00	\$15,009.18	\$25,000.00
0101-5210-1	Diocesan Council	\$3,421.77	\$0.00	\$3,421.77	\$3,000.00
TOTAL DIOCESE OF OHIO		\$18,430.95	\$0.00	\$18,430.95	\$28,000.00
ANGLICAN RESERVES					
0101-5305-1	General Convention-from Reserve	\$45,531.91	\$0.00	\$45,531.91	\$0.00
Total ANGLICAN RESERVES		\$45,531.91	\$0.00	\$45,531.91	\$0.00
TOTAL DIOCESAN, EPISCOPAL CHURCH AND ANGLICAN COMMUNION RESP		\$682,567.50	\$0.00	\$682,567.50	\$648,685.00
OFFICE OF MISSION					
0101-5105-16	Episcopal Relief and Dev./Admin. & Promotion	\$438.30	\$0.00	\$438.30	\$500.00
0101-5602-16	Domestic and International Mission & Service Projects	\$0.00	\$0.00	\$0.00	\$15,000.00
0101-5603-16	Hunger and Homelessness Task Force	\$11.06	\$0.00	\$11.06	\$1,000.00
0101-5604-16	Commission on Global and Domestic Mission (CGDM)	\$118.48	\$0.00	\$118.48	\$1,000.00
0101-5606-16	Social Concerns/Advocacy	\$3.68	\$0.00	\$3.68	\$1,000.00
0101-5607-16	Ohio Council of Churches	\$15,020.00	\$0.00	\$15,020.00	\$15,000.00
0101-5608-16	MDG Expense	\$22,000.00	\$0.00	\$22,000.00	\$22,000.00
0101-5609-16	Episcopal Community Services	\$417.63	\$0.00	\$417.63	\$1,000.00
0101-5622-16	Community Development - Linked Deposit	\$0.00	\$0.00	\$0.00	\$2,000.00
3376-5621-16	Commission for Racial Understanding	\$0.00	\$2,186.87	\$2,186.87	\$5,000.00
3705-5281-16	Community of Deacons	\$0.00	\$0.00	\$0.00	\$2,000.00
TOTAL OFFICE OF MISSION		\$38,009.15	\$2,186.87	\$40,196.02	\$65,500.00
OFFICE OF THE BISHOP AND SUPPORT OFFICES					
OFFICE OF THE BISHOP					
0101-5105-1	Bishop's Office Admin. Exp.	\$2,494.55	\$0.00	\$2,494.55	\$5,100.00
0101-5143-1	Refurbish and display Bishops' portraits	\$500.00	\$0.00	\$500.00	\$0.00

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		Operating	Special Funds	Total Actual	Annual Budget
0101-5153-1	New Ministry Initiatives	\$520.06	\$0.00	\$520.06	\$5,000.00
0101-5156-1	Community Building/Hospitality	\$6,672.53	\$0.00	\$6,672.53	\$5,000.00
0101-5157-1	Reimbursement to Parishes-Time of Deans	\$20,033.80	\$0.00	\$20,033.80	\$20,000.00
3405-5156-1	Community Building/Hospitality	\$0.00	\$0.00	\$0.00	\$5,000.00
TOTAL OFFICE OF THE BISHOP		\$30,220.94	\$0.00	\$30,220.94	\$40,100.00
FINANCE OFFICE					
0101-5105-2	Treasurer's Office Admin. Exp.	\$4,879.42	\$0.00	\$4,879.42	\$3,600.00
0101-5110-2	Finance Office Business Exp.	\$1,789.69	\$0.00	\$1,789.69	\$800.00
0101-5120-2	Acctg. System Maintenance Cont	\$4,148.54	\$0.00	\$4,148.54	\$4,000.00
0101-5130-2	Archive Expense	\$49.99	\$0.00	\$49.99	\$700.00
0101-5132-2	Bank Fees	\$9,592.19	\$0.00	\$9,592.19	\$300.00
0101-5133-2	Payroll Service	\$2,416.60	\$0.00	\$2,416.60	\$2,400.00
0101-5135-2	Audit Fee	\$27,800.00	\$0.00	\$27,800.00	\$27,000.00
0101-5151-2	Parish Audit Team	(\$338.28)	\$0.00	(\$338.28)	\$0.00
TOTAL FINANCE OFFICE		\$50,338.15	\$0.00	\$50,338.15	\$38,800.00
DEVELOPMENT OFFICE					
0101-5110-2	Administrative Expense	\$5,793.89	\$0.00	\$5,793.89	\$5,000.00
0101-5113-2	Promotion/Publications	\$315.80	\$0.00	\$315.80	\$1,000.00
0101-5115-2	Office Expense	\$50.75	\$0.00	\$50.75	\$0.00
0101-5125-2	Gift Tracking - Software Maintenance	\$4,367.56	\$0.00	\$4,367.56	\$5,000.00
0101-5149-2	Stewardship Education & Promotion	\$0.00	\$0.00	\$0.00	\$2,500.00
0101-5150-2	Institute for Service Learning	\$0.00	\$0.00	\$0.00	\$3,000.00
0101-5162-2	Episcopal Network for Stewardship - subscription	\$2,103.00	\$0.00	\$2,103.00	\$1,100.00
0101-5164-2	Gift Planning - Resources and Promotion	\$5,462.32	\$0.00	\$5,462.32	\$4,000.00
3408-5161-2	Expenses of Bishop's Appeal	\$0.00	\$25,378.73	\$25,378.73	\$25,000.00
TOTAL DEVELOPMENT OFFICE		\$18,093.32	\$25,378.73	\$43,472.05	\$46,600.00
COMMUNICATIONS OFFICE					
0101-5105-2	Communication Admin. Exp.	\$1,856.72	\$0.00	\$1,856.72	\$2,500.00
0101-5205-2	Church Life/Professional Services (writing)	\$2,936.80	\$0.00	\$2,936.80	\$3,000.00
0101-5206-2	Church Life/Professional Services (photos/videos)	\$2,216.84	\$0.00	\$2,216.84	\$2,500.00
0101-5210-2	Church Life/Production-printin	\$19,795.41	\$0.00	\$19,795.41	\$25,565.00
0101-5215-2	Church Life/Postage	\$9,958.51	\$0.00	\$9,958.51	\$9,000.00
0101-5219-2	Internet Link	\$0.00	\$0.00	\$0.00	\$70.00
0101-5225-2	Church Life/Mail List Mgt.	\$1,829.98	\$0.00	\$1,829.98	\$4,000.00
0101-5230-2	Church Life/Misc. Expense	\$85.59	\$0.00	\$85.59	\$0.00
0101-5300-2	Directory & Canons	\$4.98	\$0.00	\$4.98	\$4,500.00
0101-5400-2	Diocesan Journal/Pmting & Dis	\$856.50	\$0.00	\$856.50	\$1,500.00
0101-5401-2	Advertising Campaign	\$16,204.06	\$0.00	\$16,204.06	\$55,000.00
0101-5413-2	Technology Consulting	\$6,400.25	\$0.00	\$6,400.25	\$9,100.00
0101-5416-2	Domain Names (for parish web sites)	\$0.00	\$0.00	\$0.00	\$100.00
0101-5805-2	Diocesan Mailings	\$4,230.31	\$0.00	\$4,230.31	\$7,000.00
TOTAL COMMUNICATIONS OFFICE		\$66,375.95	\$0.00	\$66,375.95	\$123,835.00
PERSONNEL					
Salaries and Benefits					
0101-5105-2	Salaries/Wages-Diocesan Staff	\$928,115.08	\$0.00	\$928,115.08	\$1,061,842.45
0101-5110-2	Overtime-nonexempt Salaried Dio.Staff	\$166.95	\$0.00	\$166.95	\$0.00
0101-5118-2	Termination/Relocation	\$11,594.63	\$0.00	\$11,594.63	\$0.00
0101-5120-2	Contract Personnel Expense	\$9,400.00	\$0.00	\$9,400.00	\$0.00
0101-5125-2	Part-time Temporary Help	\$5,907.50	\$0.00	\$5,907.50	\$7,000.00
0101-5130-2	FICA/Medicare Taxes	\$37,257.86	\$0.00	\$37,257.86	\$46,401.50
0101-5135-2	Clergy Pension	\$72,172.46	\$0.00	\$72,172.46	\$70,040.00
0101-5140-2	Lay Pension & Long Term Disabi	\$50,048.65	\$0.00	\$50,048.65	\$57,783.00
0101-5145-2	Employees Health Insurance	\$190,139.57	\$0.00	\$190,139.57	\$224,650.00
0101-5150-2	Employees Dental Insurance	\$10,495.93	\$0.00	\$10,495.93	\$13,250.00
0101-5155-2	Group Life Insurance	\$2,378.49	\$0.00	\$2,378.49	\$2,000.00
0101-5160-2	Workers Compensation	\$2,076.94	\$0.00	\$2,076.94	\$5,412.65
0101-5167-2	Supplement Fitness Membership	\$42.94	\$0.00	\$42.94	\$0.00
0101-5168-2	Flexible Spending Plan	\$1,362.00	\$0.00	\$1,362.00	\$1,400.00



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	Operating	Special Funds	Total Actual	Annual Budget
0101-5169-2 COBRA Administrative Fees	\$1,402.80	\$0.00	\$1,402.80	\$0.00
0101-5170-2 Professional Education-Diocesan Staff	\$3,048.39	\$0.00	\$3,048.39	\$3,000.00
0101-5174-2 Staff Training-Senior Staff	\$325.25	\$0.00	\$325.25	\$2,500.00
0101-5175-2 Staff Training-Support Team	\$379.04	\$0.00	\$379.04	\$3,000.00
3705-5170-2 Professional Education-Diocesan Staff	\$0.00	\$382.94	\$382.94	\$3,000.00
Total Salaries and Benefits	\$1,326,314.48	\$382.94	\$1,326,697.42	\$1,501,279.60
Benefit Expense - Retirees				
0101-5190-2 Retirees Health Ins.Supplement	\$24,128.41	\$0.00	\$24,128.41	\$24,500.00
0101-5195-2 Retirees Group Life Insur./Lay	\$282.62	\$0.00	\$282.62	\$300.00
Total Benefit Expense - Retirees	\$24,411.03	\$0.00	\$24,411.03	\$24,800.00
TOTAL PERSONNEL	\$1,350,725.51	\$382.94	\$1,351,108.45	\$1,526,079.60
TRAVEL EXPENSES				
STAFF TRAVEL REIMBURSEMENTS				
0101-5105-2 TRVL-Bishop	\$11,988.34	\$0.00	\$11,988.34	\$12,000.00
0101-5106-2 TRVL-Assisting Bishops	\$15,270.02	\$0.00	\$15,270.02	\$12,000.00
0101-5107-2 TRVL - Canon to the Ordinary	\$2,903.32	\$0.00	\$2,903.32	\$5,000.00
0101-5115-2 TRVL-Treasurer	\$53.54	\$0.00	\$53.54	\$0.00
0101-5116-2 TRVL-Chief Financial Officer	\$725.45	\$0.00	\$725.45	\$2,500.00
0101-5120-2 TRVL-Support Team	\$1,613.52	\$0.00	\$1,613.52	\$4,500.00
0101-5130-2 TRVL-Canon for Ministry	\$8,169.78	\$0.00	\$8,169.78	\$8,500.00
0101-5135-2 TRVL-Canon for Congregations	\$6,263.03	\$0.00	\$6,263.03	\$10,000.00
0101-5136-2 TRVL-Stewardship/Development Officer	\$194.15	\$0.00	\$194.15	\$0.00
0101-5140-2 TRVL-Canon for Christian Formation	\$3,683.26	\$0.00	\$3,683.26	\$10,000.00
0101-5145-2 TRVL-Canon for Mission	\$2,725.36	\$0.00	\$2,725.36	\$0.00
0101-5150-2 TRVL-Communications Director	\$1,493.39	\$0.00	\$1,493.39	\$3,500.00
TOTAL STAFF TRAVEL REIMBURSEMENTS	\$55,083.16	\$0.00	\$55,083.16	\$68,000.00
MILEAGE REIMBURSEMENTS				
0101-5187-2 Mileage Reimbursement-Bishop	\$6,036.98	\$0.00	\$6,036.98	\$6,000.00
0101-5188-2 Mileage Reimbursement - Volunteers	\$670.76	\$0.00	\$670.76	\$6,000.00
TOTAL MILEAGE REIMBURSEMENTS	\$6,707.74	\$0.00	\$6,707.74	\$12,000.00
TOTAL TRAVEL EXPENSES	\$61,790.90	\$0.00	\$61,790.90	\$80,000.00
OFFICE EXPENSES				
0101-5109-2 Trinity Commons - T1 Internet Connection	\$1,794.00	\$0.00	\$1,794.00	\$1,800.00
0101-5110-2 Telephone-Local	\$4,084.43	\$0.00	\$4,084.43	\$5,500.00
0101-5115-2 Telephone-Long Distance	\$1,081.55	\$0.00	\$1,081.55	\$2,000.00
0101-5120-2 Telephone-"800" Service	\$283.94	\$0.00	\$283.94	\$1,000.00
0101-5126-2 Reimburse-Trinity	\$43.50	\$0.00	\$43.50	\$0.00
0101-5210-2 Insurance-Liability, D&O, Bonding	\$9,043.00	\$0.00	\$9,043.00	\$12,000.00
0101-5215-2 Hospitality	\$1,685.44	\$0.00	\$1,685.44	\$2,000.00
0101-5216-2 Plant Maintenance	\$1,104.95	\$0.00	\$1,104.95	\$1,000.00
0101-5222-2 Building Operating Expenses	\$99,609.00	\$0.00	\$99,609.00	\$104,214.00
0101-5224-2 Real Estate Taxes	\$12,387.25	\$0.00	\$12,387.25	\$12,000.00
3201-5222-2 Building Operating Expenses	\$0.00	\$129,036.00	\$129,036.00	\$129,036.00
TOTAL OFFICE EXPENSES	\$131,117.06	\$129,036.00	\$260,153.06	\$270,550.00
EQUIPMENT & SUPPLIES				
0101-5105-3 Postage Equip. (Lease & Maintenance)	\$2,428.12	\$0.00	\$2,428.12	\$600.00
0101-5106-3 Postage-Usage	\$12,860.82	\$0.00	\$12,860.82	\$12,000.00
0101-5110-3 Postage-Charged Back to Offices/Com.	(\$12,761.56)	\$0.00	(\$12,761.56)	(\$12,000.00)
0101-5205-3 Copiers-Lease Expense	\$12,565.97	\$0.00	\$12,565.97	\$13,500.00
0101-5210-3 Copiers-Maintenance Charges	\$13,101.62	\$0.00	\$13,101.62	\$12,000.00
0101-5214-3 Copies - Unreimbursed	\$0.00	\$0.00	\$0.00	\$500.00
0101-5215-3 Copies-Supplies	\$686.13	\$0.00	\$686.13	\$0.00
0101-5220-3 Copier-Paper	\$1,249.81	\$0.00	\$1,249.81	\$1,000.00
0101-5225-3 Copier-Charged Back to Offices/Com.	(\$27,710.02)	\$0.00	(\$27,710.02)	(\$25,800.00)
0101-5305-3 Computer Software	\$5,062.90	\$0.00	\$5,062.90	\$6,000.00

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		Operating	Special Funds	Total Actual	Annual Budget
0101-5310-3	Computer Supplies	\$1,973.74	\$0.00	\$1,973.74	\$0.00
0101-5320-3	Computer Equipment Repair/Modification	\$1,158.75	\$0.00	\$1,158.75	\$2,000.00
0101-5325-3	Computer Equipment-From Acq.&Repl. Reserve	\$774.00	\$0.00	\$774.00	\$0.00
0101-5329-3	Computer Consulting	\$6,637.50	\$0.00	\$6,637.50	\$0.00
0101-5405-3	Office Furnishings	\$1,013.10	\$0.00	\$1,013.10	\$1,000.00
0101-5505-3	Office Supplies	\$2,382.62	\$0.00	\$2,382.62	\$5,000.00
0101-5510-3	Stationery/Printing	\$2,833.89	\$0.00	\$2,833.89	\$1,800.00
0101-5605-3	Office Equipment-misc.	\$500.00	\$0.00	\$500.00	\$500.00
0101-5805-3	Diocesan Mailings	\$24.70	\$0.00	\$24.70	\$0.00
3303-5405-3	Office Equipment-Misc.	\$0.00	\$0.00	\$0.00	\$1,000.00
EQUIPMENT & SUPPLIES		\$24,782.09	\$0.00	\$24,782.09	\$19,100.00
TOTAL OFFICE OF THE BISHOP AND SUPPORT OFFICES		\$1,733,443.92	\$154,797.67	\$1,888,241.59	\$2,145,064.60
LEGAL FEES AND RELATED EXPENSES					
0101-5105-48	Losses & Shortages	\$18.30	\$0.00	\$18.30	\$0.00
0101-5140-48	Legal & Other Expenses/Misconduct-from Reserve	\$286,936.44	\$0.00	\$286,936.44	\$0.00
0101-5274-48	Real Estate Taxes - Imperiled Parishes	\$15,396.42	\$0.00	\$15,396.42	\$0.00
0101-5275-48	Transfiguration/Cleveland	\$15,721.00	\$0.00	\$15,721.00	\$0.00
TOTAL LEGAL FEES AND RELATED EXPENSES		\$318,072.16	\$0.00	\$318,072.16	\$0.00
TOTAL EXPENSES		\$3,006,334.35	\$377,465.42	\$3,383,799.77	\$3,377,609.60
FUND TRANSFERS					
INTER FUND TRANSFERS					
INTER FUND TRANSFERS TO OTHER FUNDS					
0101-7015-5	Transfer To Cedar Hills Opg.	\$151,999.92	\$0.00	\$151,999.92	\$152,000.00
0101-7025-5	Transfer To Property-Capitalized	\$13,183.15	\$0.00	\$13,183.15	\$0.00
0101-7030-5	Transfer to Sacred Path Books	\$56,319.66	\$0.00	\$56,319.66	\$0.00
TOTAL INTER FUND TRANSFERS TO OTHER FUNDS		\$221,502.73	\$0.00	\$221,502.73	\$152,000.00
INTER FUND TRANSFERS FROM OTHER FUNDS					
0101-7427-5	Transfer from Bishop's Appeal fund	(\$7,043.00)	\$0.00	(\$7,043.00)	\$0.00
TOTAL INTERFUND TRANSFERS FROM OTHER FUNDS		(\$7,043.00)	\$0.00	(\$7,043.00)	\$0.00
TOTAL INTER FUND TRANSFERS		\$214,459.73	\$0.00	\$214,459.73	\$152,000.00
INTRA FUND TRANSFERS					
INTRA FUND TRANSFERS FROM UNDESIGNATED					
0101-7117-5	To Reserve for Advertising	\$55,000.00	\$0.00	\$55,000.00	\$0.00
0101-7120-5	To Reserve General Convention	\$15,000.00	\$0.00	\$15,000.00	\$15,000.00
0101-7122-5	To Reserve for Ohio Day at National Cathedral	\$10,000.00	\$0.00	\$10,000.00	\$0.00
0101-7125-5	To Reserve Lambeth Conf. Trvl.	\$2,000.04	\$0.00	\$2,000.04	\$2,000.00
0101-7130-5	To Reserve Future Epis. Trans.	\$15,000.00	\$0.00	\$15,000.00	\$15,000.00
0101-7131-5	To Reserve - International Development	\$15,000.00	\$0.00	\$15,000.00	\$0.00
0101-7132-5	To Reserve - Trinity Commons Capital	\$9,999.96	\$0.00	\$9,999.96	\$10,000.00
0101-7134-5	To Reserve for Congregations and Christian Formation	\$2,640.00	\$0.00	\$2,640.00	\$0.00
TOTAL INTRA FUND TRANSFERS FROM UNDESIGNATED		\$124,640.00	\$0.00	\$124,640.00	\$42,000.00
INTRA FUND TRANSFERS TO UNDESIGNATED					
0101-7220-5	From Reserve for General Convention	(\$45,531.91)	\$0.00	(\$45,531.91)	\$0.00
0101-7221-5	From Reserve for Congregational Development	(\$7,500.00)	\$0.00	(\$7,500.00)	\$0.00
0101-7222-5	From Reserve for Kenyon Conference	(\$5,000.00)	\$0.00	(\$5,000.00)	\$0.00
0101-7243-5	From Reserve for Advertising	(\$16,060.06)	\$0.00	(\$16,060.06)	\$0.00
0101-7250-5	From Reserve Computer Equipment Acq.&Repl.	(\$13,957.15)	\$0.00	(\$13,957.15)	\$0.00
0101-7254-5	From Reserve for Investment Gain Balance	(\$318,053.86)	\$0.00	(\$318,053.86)	\$0.00
TOTAL INTRA FUND TRANSFERS TO UNDESIGNATED		(\$406,102.98)	\$0.00	(\$406,102.98)	\$0.00
TOTAL INTRA FUND TRANSFERS		(\$281,462.98)	\$0.00	(\$281,462.98)	\$42,000.00
TOTAL FUND TRANSFERS		(\$67,003.25)	\$0.00	(\$67,003.25)	\$194,000.00
NET SURPLUS/(DEFICIT)		\$71,930.55	\$0.00	\$71,930.55	\$0.00

**Episcopal Diocese of Ohio  
Cedar Hills Operating Income Statement  
for the year ended December 31, 2009**

	<u>Operating</u>	<u>Capital Reserves</u>	<u>Total Actual</u>	<u>Annual Budget</u>
<b>RECEIPTS</b>				
ENDOWMENT INCOME				
Cedar Hills Endowment	\$29,708.16	\$0.00	\$29,708.16	\$22,800.00
TOTAL ENDOWMENT INCOME	\$29,708.16	\$0.00	\$29,708.16	\$22,800.00
FEES				
Food Service	\$19,961.75	\$0.00	\$19,961.75	\$37,000.00
Lodging	\$49,350.25	\$0.00	\$49,350.25	\$54,500.00
Summer Camp	\$20,910.00	\$0.00	\$20,910.00	\$29,000.00
Misc. Program	\$0.00	\$0.00	\$0.00	\$3,000.00
Other	\$4,505.11	\$0.00	\$4,505.11	\$4,091.00
TOTAL FEES	\$94,727.11	\$0.00	\$94,727.11	\$127,591.00
OTHER RECEIPTS				
Friends of Cedar Hills	\$11,397.00	\$0.00	\$11,397.00	\$15,000.00
Deposits/Fees-Forfeit/Cancelled	\$295.00	\$0.00	\$295.00	\$0.00
Stewards Program	\$0.00	\$0.00	\$0.00	\$1,000.00
TOTAL OTHER RECEIPTS	\$11,692.00	\$0.00	\$11,692.00	\$16,000.00
<b>TOTAL RECEIPTS</b>	<b>\$136,127.27</b>	<b>\$0.00</b>	<b>\$136,127.27</b>	<b>\$166,391.00</b>
<b>EXPENSES</b>				
FOOD SERVICE EXPENSES				
Food and Supplies	\$30,041.80	\$0.00	\$30,041.80	\$33,000.00
TOTAL FOOD SERVICE EXPENSES	\$30,041.80	\$0.00	\$30,041.80	\$33,000.00
LODGING SERVICES EXPENSES				
Contract Housekeeping	\$450.16	\$0.00	\$450.16	\$0.00
Linen Care & Replacement	\$1,512.70	\$0.00	\$1,512.70	\$1,400.00
Fuels	\$23,332.71	\$0.00	\$23,332.71	\$18,000.00
Water	\$9,729.00	\$0.00	\$9,729.00	\$9,000.00
Custodial Supplies & Equipment	\$703.78	\$0.00	\$703.78	\$1,000.00
Electricity (Lodge and Cabins)	\$8,740.44	\$0.00	\$8,740.44	\$8,500.00
TOTAL LODGING SERVICES EXPENSES	\$44,468.79	\$0.00	\$44,468.79	\$37,900.00
PROGRAM EXPENSES				
Summer Camp Advertising & Brochures	\$2,602.32	\$0.00	\$2,602.32	\$2,000.00
Staff Training/Specialty Fees	\$2,138.08	\$0.00	\$2,138.08	\$3,000.00
Off-site Activity Fees	\$0.00	\$0.00	\$0.00	\$0.00
Event Transportation & Auto Insurance	\$205.68	\$0.00	\$205.68	\$0.00
Campers Accident/Sickness Insurance	\$0.00	\$0.00	\$0.00	\$900.00
Program Supplies & Equipment	\$2,716.22	\$0.00	\$2,716.22	\$9,000.00
Misc. Program Expenses	\$50.00	\$0.00	\$50.00	\$200.00
Volunteer Affirmation Program	\$0.00	\$0.00	\$0.00	\$1,000.00
TOTAL PROGRAM EXPENSES	\$7,712.30	\$0.00	\$7,712.30	\$16,100.00
FUND RAISING EXPENSES				
Appeals Production and Postage	\$6,639.87	\$0.00	\$6,639.87	\$6,100.00
Credit Card Fees	\$42.41	\$0.00	\$42.41	\$100.00
TOTAL FUND RAISING EXPENSES	\$6,682.28	\$0.00	\$6,682.28	\$6,200.00
FACILITY OVERHEAD				
Electricity (Sign, Pool, Garage, Septic)	\$7,628.91	\$0.00	\$7,628.91	\$7,300.00

**Episcopal Diocese of Ohio**  
**Cedar Hills Operating Income Statement**  
for the year ended December 31, 2009

	<b>Operating</b>	<b>Capital Reserves</b>	<b>Total Actual</b>	<b>Annual Budget</b>
Tools and Materials	\$9,407.85	\$0.00	\$9,407.85	\$10,000.00
Outsourced Maintenance and Services	\$28,996.72	\$0.00	\$28,996.72	\$32,000.00
Septic Fees/Expenses	\$460.00	\$0.00	\$460.00	\$500.00
Pool Supplies/Services	\$2,269.51	\$0.00	\$2,269.51	\$3,700.00
Vehicle Maintenance/Fuel	\$2,021.18	\$0.00	\$2,021.18	\$4,000.00
Vehicle Insurance	\$2,202.26	\$0.00	\$2,202.26	\$2,500.00
Property Insurance	\$9,725.00	\$0.00	\$9,725.00	\$18,000.00
Taxes	\$2,350.92	\$0.00	\$2,350.92	\$2,400.00
Stewards Program Expense	\$0.00	\$0.00	\$0.00	\$1,000.00
Repairs & Maintenance - From Reserves	\$10,098.58	\$0.00	\$10,098.58	\$0.00
<b>TOTAL FACILITY OVERHEAD</b>	<b>\$75,160.93</b>	<b>\$0.00</b>	<b>\$75,160.93</b>	<b>\$81,400.00</b>
<b>ADMINISTRATIVE OVERHEAD</b>				
Past Due Fees	\$29.00	\$0.00	\$29.00	\$0.00
Office Equipment and Computers	\$6,115.34	\$0.00	\$6,115.34	\$5,400.00
Office Supplies and Misc.	\$1,402.80	\$0.00	\$1,402.80	\$2,000.00
Accounts Receivable Write-Offs	\$0.00	\$0.00	\$0.00	\$0.00
Postage	\$365.66	\$0.00	\$365.66	\$1,000.00
Telephone	\$6,932.29	\$0.00	\$6,932.29	\$8,500.00
Printing Expense	\$0.00	\$0.00	\$0.00	\$500.00
Marketing	\$705.83	\$0.00	\$705.83	\$1,000.00
Director's Travel	\$2,136.55	\$0.00	\$2,136.55	\$1,500.00
Director's Cont. Ed.	\$750.00	\$0.00	\$750.00	\$750.00
Electricity (Director's House)	\$2,189.37	\$0.00	\$2,189.37	\$2,300.00
Personal Property Insurance (Director)	\$144.33	\$0.00	\$144.33	\$200.00
Credit Card Fees	\$0.00	\$0.00	\$0.00	\$0.00
<b>TOTAL ADMINISTRATIVE OVERHEAD</b>	<b>\$20,771.17</b>	<b>\$0.00</b>	<b>\$20,771.17</b>	<b>\$23,150.00</b>
<b>PERSONNEL EXPENSES</b>				
<b>Program Personnel Expense</b>				
Program Staff Stipend	\$21,225.00	\$0.00	\$21,225.00	\$24,000.00
Program Staff Fica/Medicare	\$1,593.22	\$0.00	\$1,593.22	\$1,788.00
Program Workers Compensation	\$42.09	\$0.00	\$42.09	\$100.00
<b>Total Program Personnel Expense</b>	<b>\$22,860.31</b>	<b>\$0.00</b>	<b>\$22,860.31</b>	<b>\$25,888.00</b>
<b>Administrative Personnel Expense</b>				
Administrative Salaries	\$54,790.00	\$0.00	\$54,790.00	\$54,790.00
Administrative Pension/LTD	\$12,766.80	\$0.00	\$12,766.80	\$12,632.00
Administrative Health Insurance	\$21,099.60	\$0.00	\$21,099.60	\$21,700.00
Administrative Dental Insurance	\$1,145.11	\$0.00	\$1,145.11	\$1,305.00
Administrative Workers Compensation	\$129.91	\$0.00	\$129.91	\$340.00
Administrative Life Insurance	\$209.80	\$0.00	\$209.80	\$320.00
<b>Total Administrative Personnel Expense</b>	<b>\$90,141.22</b>	<b>\$0.00</b>	<b>\$90,141.22</b>	<b>\$91,087.00</b>
<b>Hospitality Team Personnel Expense</b>				
Hospitality Team Wages	\$450.00	\$0.00	\$450.00	\$0.00
Hospitality Team Fica/Medicare	\$0.00	\$0.00	\$0.00	\$0.00
Hospitality Team Pension/LTD	(\$282.60)	\$0.00	(\$282.60)	\$0.00
Hospitality Team Health Insurance	\$0.00	\$0.00	\$0.00	\$0.00
Hospitality Team Dental Insurance	\$0.00	\$0.00	\$0.00	\$0.00
Hospitality Team Workers Compensation	\$0.00	\$0.00	\$0.00	\$0.00
Hospitality Team Life Insurance	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Hospitality Team Personnel Expense</b>	<b>\$167.40</b>	<b>\$0.00</b>	<b>\$167.40</b>	<b>\$0.00</b>

**Episcopal Diocese of Ohio  
Cedar Hills Operating Income Statement  
for the year ended December 31, 2009**

	<u>Operating</u>	<u>Capital Reserves</u>	<u>Total Actual</u>	<u>Annual Budget</u>
Hospitality Team (General) Personnel Expenses				
Hospitality Team (General) Wage	\$0.00	\$0.00	\$0.00	\$0.00
Hospitality Team (General) FICA/Medicare	\$0.00	\$0.00	\$0.00	\$0.00
Hospitality Team (General) Pension	\$0.00	\$0.00	\$0.00	\$0.00
Total Hospitality Team (General) Personnel Expenses	\$0.00	\$0.00	\$0.00	\$0.00
Service Employees Personnel Expense				
Service Employees, PT, On-Call, Hourly Wages	\$18,235.55	\$0.00	\$18,235.55	\$21,500.00
Service Employees Fica/Medicare	\$1,395.01	\$0.00	\$1,395.01	\$1,566.00
Service Employees Workers Compensation	\$54.35	\$0.00	\$54.35	\$170.00
Total Service Employees Personnel Expense	\$19,684.91	\$0.00	\$19,684.91	\$23,236.00
Retiree Medical Supplements	\$5,302.29	\$0.00	\$5,302.29	\$5,430.00
TOTAL PERSONNEL EXPENSES	\$138,156.13	\$0.00	\$138,156.13	\$145,641.00
<b>TOTAL EXPENSES</b>	<b>\$322,993.40</b>	<b>\$0.00</b>	<b>\$322,993.40</b>	<b>\$343,391.00</b>
<b>FUND TRANSFERS</b>				
INTER FUND TRANSFERS				
Inter Fund Transfers to Other Funds				
Transfer To Property-Capitalized	\$4,686.11	\$0.00	\$4,686.11	\$0.00
Total Inter Fund Transfers to Other Funds	\$4,686.11	\$0.00	\$4,686.11	\$0.00
Inter Fund Transfers from Other Funds				
Transfer From Other Custodial Funds	\$0.00	\$0.00	\$0.00	\$0.00
Transfer From Diocesan Opg. Fund	(\$151,999.92)	\$0.00	(\$151,999.92)	(\$152,000.00)
Transfer from Temporarily Restricted Fund	(\$30,655.00)	\$0.00	(\$30,655.00)	(\$40,000.00)
Total Inter Fund Transfers from Other Funds	(\$182,654.92)	\$0.00	(\$182,654.92)	(\$192,000.00)
TOTAL INTER FUND TRANSFERS	(\$177,968.81)	\$0.00	(\$177,968.81)	(\$192,000.00)
INTRA FUND TRANSFERS				
To Reserve for Capital Repairs	\$15,000.00	\$0.00	\$15,000.00	\$15,000.00
From Reserve for Capital Repairs	(\$14,784.69)	\$0.00	(\$14,784.69)	\$0.00
Intra Fund Transfers to Designated				
From Undesignated to Reserves	\$0.00	(\$15,000.00)	(\$15,000.00)	\$0.00
Total Intra Fund Transfers to Designated	\$0.00	(\$15,000.00)	(\$15,000.00)	\$0.00
Intra Fund Transfers from Designated				
To Undesignated	\$0.00	\$14,784.69	\$14,784.69	\$0.00
Total Intra Fund Transfers from Designated	\$0.00	\$14,784.69	\$14,784.69	\$0.00
TOTAL INTRA FUND TRANSFERS	\$215.31	(\$215.31)	\$0.00	\$15,000.00
<b>TOTAL FUND TRANSFERS AND ADJUSTMENTS</b>	<b>(\$177,753.50)</b>	<b>(\$215.31)</b>	<b>(\$177,968.81)</b>	<b>(\$177,000.00)</b>
<b>NET SURPLUS/(DEFICIT)</b>	<b>(\$9,112.63)</b>	<b>\$215.31</b>	<b>(\$8,897.32)</b>	<b>\$0.00</b>

**Episcopal Diocese of Ohio**  
**Trinity Commons Books & Gifts**  
as of December 31, 2009

**Assets**

Cash/Checking	\$21,298.84
Inventory-Book Log	\$51,074.18
Petty Cash	\$400.00
Accounts Receivable	\$5,660.74
Accts. Receivable - AMEX	\$31.61
Cash Due To From	(\$62,413.19)
Other Receivables	\$25,338.22
<b>Total Assets</b>	<b><u>\$41,390.40</u></b>

**Liabilities and Fund Balance**

**Liabilities**

Accounts Payable	\$438.37
Misc. Deposits	\$4.15
Gift Certificates Sold	\$111.63
GIVEX Gift Cards Sold	\$1,818.83
<b>Total Liabilities</b>	<b><u>\$2,372.98</u></b>

**Fund Balance**

Net Assets	<u>\$39,017.42</u>
<b>Total Fund Balance</b>	<b><u>\$39,017.42</u></b>

<b>Total Liabilities and Fund Balance</b>	<b><u>\$41,390.40</u></b>
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**Episcopal Diocese of Ohio**  
**Trinity Commons Books & Gifts - Operating Income Statement**  
 For the Year Ended December 31, 2009

	<u>Operating</u>	<u>Business Plan</u>
<b>RECEIPTS</b>		
<b>STORE SALES</b>		
Store Sales - Taxable	\$91,506.39	\$93,500.00
Store Sales - Non Taxable	\$41,676.43	\$93,500.00
Sales-Consignment Items - Taxable	\$3,438.62	\$0.00
Fee Shipping & Handling	\$1,062.87	\$0.00
Less Sales Discounts	(\$40.00)	\$0.00
<b>TOTAL STORE SALES</b>	<u>\$137,644.31</u>	<u>\$187,000.00</u>
<b>BOOKSENSE SALES</b>		
Store Fulfilled		
Booksense - Store Fulfilled Sales - Taxable	\$44.99	\$0.00
Booksense - Store Fulfilled Sales - Nontaxable	\$453.60	\$0.00
Fee Shipping & Handling - Booksense - Store Fulfilled	\$9.90	\$0.00
Total Store Fulfilled	<u>\$508.49</u>	<u>\$0.00</u>
Warehouse Fulfilled		
Booksense - Warehouse Fulfilled Sales - Taxable	\$27.95	\$0.00
Booksense - Warehouse Fulfilled Sales - Nontaxable	\$24.38	\$0.00
Fee Shipping & Handling - Booksense - Warehouse Fulfilled	\$0.00	\$0.00
Total Warehouse Fulfilled	<u>\$52.33</u>	<u>\$0.00</u>
<b>TOTAL BOOKSENSE SALES</b>	<u>\$560.82</u>	<u>\$0.00</u>
<b>OTHER RECEIPTS</b>		
Interest Fifth Third Accounts	\$9.44	\$0.00
Gifts - Summer Reading Campaign - TR	\$20.00	\$0.00
Grants Received - Trinity Cathedral	\$25,338.22	\$0.00
Earned Discounts	\$119.11	\$0.00
Misc. Other Income	\$55.62	\$0.00
<b>TOTAL OTHER RECEIPTS</b>	<u>\$25,542.39</u>	<u>\$0.00</u>
<b>TOTAL RECEIPTS</b>	<u>\$163,747.52</u>	<u>\$187,000.00</u>
<b>EXPENSES</b>		
<b>COST OF GOODS SOLD - STORE</b>		
Merchandise	\$98,282.03	\$97,446.20
Paid on Consignment Items	\$2,215.73	\$0.00
Miscellaneous Charges	\$8.00	\$0.00
Shipping-Inbound	\$3,947.48	\$4,862.00
Shipping - Outbound - Returns	\$287.64	\$0.00
<b>TOTAL COST OF GOODS SOLD - STORE</b>	<u>\$104,740.88</u>	<u>\$102,308.20</u>
<b>SALES &amp; MARKETING EXPENSE</b>		
Shipping-Outbound Postage	\$108.83	\$1,000.00
Shipping-Outbound UPS	\$203.17	\$1,000.00
Marketing/Promotion	\$283.59	\$9,350.00
Lost Merchandise	\$30.60	\$0.00
Promotional Contributions	\$30.16	\$0.00

**Episcopal Diocese of Ohio**  
**Trinity Commons Books & Gifts - Operating Income Statement**  
For the Year Ended December 31, 2009

	<u>Operating</u>	<u>Business Plan</u>
Advertising	\$262.59	\$1,000.00
Booksense Website - Monthly Fee	\$2,718.48	\$2,700.00
GIVEX Gift Cards - Monthly Fee	\$236.10	\$250.00
TOTAL SALES & MARKETING EXPENSE	<u>\$3,873.52</u>	<u>\$15,300.00</u>
PERSONNEL EXPENSES		
Salaries	\$8,730.67	\$30,000.00
Contract Labor	\$38,590.21	\$0.00
Part-Time Help	\$15,362.46	\$15,600.00
Worker's Compensation	\$48.50	\$638.40
FICA/Medicare	\$1,607.82	\$3,488.40
Lay Pension	\$903.62	\$3,105.00
Employees' Health Insurance	\$3,165.21	\$7,200.00
Employees Dental Insurance	\$171.30	\$660.00
Group Life Insurance	\$46.95	\$180.00
TOTAL PERSONNEL EXPENSES	<u>\$68,626.74</u>	<u>\$60,871.80</u>
ADMINISTRATIVE EXPENSES		
Postage	\$486.85	\$650.00
Copies	\$211.83	\$800.00
Telephone Expenses	\$344.40	\$0.00
Supplies	\$1,307.87	\$1,500.00
AMEX Charges	\$203.68	\$187.00
VISA/MC charges	\$2,562.21	\$1,496.00
Discover Card Charges	\$103.09	\$187.00
Memberships/Subscriptions	\$1,052.37	\$1,000.00
Bank Charges	\$893.61	\$650.00
Volunteers-Hospitality/Expenses	\$75.57	\$100.00
Travel	\$1,776.78	\$1,200.00
Trade Shows	\$1,483.47	\$250.00
Space/Displays	\$0.00	\$500.00
Computer Software/Equipment/Supplies	\$1,243.96	\$0.00
Misc.	\$188.00	\$0.00
Cash Over/Under	(\$109.10)	\$0.00
TOTAL ADMINISTRATIVE EXPENSES	<u>\$11,824.59</u>	<u>\$8,520.00</u>
<b>TOTAL EXPENSES</b>	<u>\$189,065.73</u>	<u>\$187,000.00</u>
<b>NET SURPLUS/(DEFICIT)</b>	<u><u>(\$25,318.21)</u></u>	<u><u>\$0.00</u></u>



## **2009 Report: Bishop's Annual Appeal**



I am delighted to present this report to you. It highlights our shared and continuing progress in strengthening the servant ministries of our parishes and inspiring friends and supporters to ever more generous participation. This annual diocesan campaign, gathering essential financial support for diocesan mission, has evolved in a number of ways since its beginning with Episcopal Community Services (ECS) in 1992.

In 2006, I initiated The Bishop's Annual Appeal to expand our capacity to serve others. Gifts to and grants by ECS continue to be a major and significant focus of the Annual Appeal. Added are opportunities to support new ministries. The Bishop's Appeal helps to employ recently ordained clergy, sustaining them in their critical first years of ministry. It also helps underwrite the costs of seminary and post-ordination formation, and brings service opportunities and spiritual formation to our children, youth, and college students.

Each year, your parish and individual gifts are enhanced with endowment funds and foundation grants. The Diocese is especially grateful to the George Gund Foundation, which in 1992 provided a three-year start up grant of \$90,000 to ECS, and continues today with generous support. Additional monies come from endowed trusts of the Diocese, specifically the Darnell, Cooper, Brayton Trusts, and Church Home Endowment.

The Episcopal Community Services Development Council then distributes ECS dollars through an annual granting process. The Council directs funds to programs where human needs cry out—to feed the hungry, shelter the homeless, and care for the weak, the sick, and the aging. This distribution process has also evolved, now giving priority attention to parish-based ministries. Guidelines elsewhere in this report outline how agencies may apply for funding.

I am especially grateful for the companionship and philanthropy in 2009 of the 688 donors who helped us realize over \$231,400 in annual gifts. I invite you to join me again this year and give as generously as you are able, as we strive to raise \$275,000 for service and mission in 2010.

Gratefully,  
*The Right Rev. Mark Hollingsworth, Jr.*  
Bishop of Ohio



Dear Friends in Christ,

The experience to serve and support the mission of Episcopal Community Services as a member and chair of the ECS Development Council has been extraordinarily rewarding.

The numbers on these pages tell the story of your generosity and compassion in meeting the needs of those who hunger and thirst in body and spirit. The other story is that of the many volunteers and who have given of themselves, their abilities, and time in God’s service. Together you make Episcopal Community Services a vehicle of compassion, love, and grace.

Thank you to all who have supported Episcopal Community Services through your gifts to the Bishop’s Annual Appeal and to those of you who will do the same in this coming year. Thank you especially to the ECS Development Council and this opportunity to serve with you. Please join me in expressing best wishes to The Rev. J. Jeffrey Baker, the new committee chair.

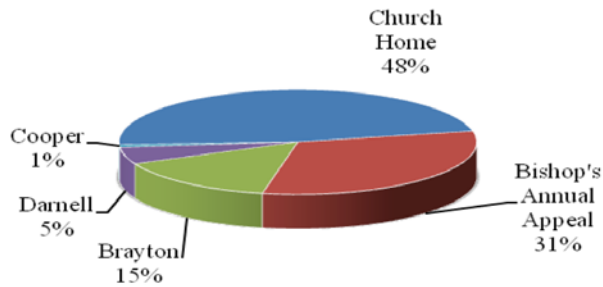
Faithfully in Christ,

(The Rev.) Evelyn N. Manzella  
Retiring Chair, Episcopal Community Services Development Council

The Bishop’s Annual Appeal				
2008–2009 Report				
January 1 to December 31				
	2008		2009	
	Gift Amount	# of Donors	Gift Amount	# of Donors
Individuals	\$207,942	868	\$193,288	661
Parishes	\$26,718	35	\$13,802	20
Foundations	\$32,410	5	\$24,316	7
TOTALS	\$267,070	908	\$231,406	688
Median Gift	\$50		\$64	
Largest Gift	\$25,000		\$20,000	

## 2009 GRANT FUND RECEIPTS AND DISBURSEMENTS

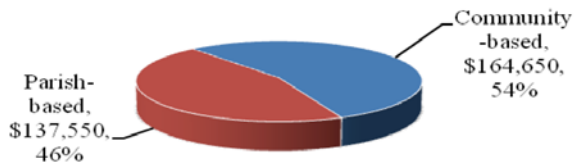
### GRANT RECEIPTS



#### Source of Receipts   Amount

Cooper	\$ 2,581
Darnell	16,546
Brayton	47,600
Campaign	100,000
Church Home	151,070
<b>TOTAL</b>	<b>\$317,797</b>

### GRANTS DISBURSED



#### Grant Type   Amount

Parish-based	\$137,550
Community-based	164,650
<b>TOTAL</b>	<b>\$302,200</b>

## Episcopal Community Services 2009 Grant Awards

### Children, Education, General Services

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
Joint Neighborhood String Education Project	St. Paul's Episcopal Church	Canton	\$2,619
After School Prevention Resources	Support to at Risk Teens (Start)	Cleveland	\$3,492
New Life Community GED Instruction	New Life Community	Cleveland	\$1,746
St. Andrew's Enrichment Program	St. Andrew's Episcopal Church	Cleveland	\$873
Open Doors, Inc.	St. Paul's Episcopal Church	Cleveland Heights	\$3,492
Culture Club	Black Heritage Library and Multicultural Center	Findlay	\$1,309
Cedar Hills Scholarship Fund	Cedar Hills Camp/Conference Center	Painesville	\$4,365
Grace Day Care	Grace Episcopal Church,	Willoughby	\$960
Child Advocacy Program	Beatitude House	Youngstown	\$1,309
Education Outreach to Homeless Children	Help Hotline Crisis Center, Inc.	Youngstown	\$2,392
Youth Volunteer Corp	HandsOn - Volunteer Network of the Valley	Youngstown	\$2,619
<b>Total</b>			<b>\$25,176</b>

### Youth Summer Grants

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
Fishing for Others	St. Paul's Episcopal Church	Bellevue	\$500
St. Andrew's Enrichment Program	St. Andrew's Episcopal Church	Cleveland	\$500
Pre and Post VBS Discipleship	Christ Episcopal Church	Geneva	\$500
"Youth Serving Together" Mission Trip	Christ Episcopal Church	Kent	\$500
"Youth Serving Together" Mission Trip	St. James Episcopal Church	Painesville	\$500
<b>Total</b>			<b>\$2,500</b>

### General Services

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
St. Peter's Fine Arts Committee: Great Music without Barriers	St. Peter's Episcopal Church	Ashtabula	\$873
The Green House Domestic Violence Center	WomanSafe	Chardon	\$2,139
Kairos Prison Ministry of Ohio	Christ Church	Huron	\$4,365
Bridges of Hope	United Way of Wayne and Holmes	Wooster	\$7,813

**Total      \$15,190**

***Housing, Homeless, Legal Services***

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
Going Home/Staying Home	Interfaith Hospitality Network of Summit County	Akron	\$3,701
Sarah's House Transitional Housing Assistance	Sarah's Friends, Inc.	Bryan	\$2,392
Episcopal Volunteer Program	LMM - /2100 Lakeside Shelter	Cleveland	\$2,182
Homeless Family Day Centers and Basic Needs Project	Interfaith Hospitality Network	Cleveland	\$3,701
Women's Re-Entry Network	Lutheran Metropolitan Ministries	Cleveland	\$4,365
Friends of the Homeless of Tuscarawas County	Trinity Episcopal Church	New Philadelphia	\$7,630
Blanket Toledo with Love	Trinity Episcopal Church	Toledo	\$2,828
FOCUS: Steps to Home Education and Employment Training	Family Outreach Community United Services	Toledo	\$5,884
Greater Youngstown Point Homeless Drop-In Center	The Greater Youngstown Point, Inc.	Youngstown	\$1,746

**Total \$34,429**

***Hunger***

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
Good Samaritan Hunger Center	Good Samaritan Hunger Center	Akron	\$2,619
Thankful Hearts Community Free Meals	St. Paul's, Bellevue	Bellevue	\$2,182
A Place at the Table	Trinity Cathedral	Cleveland	\$6,984
Bread of Life Food Pantry	Antioch Development Corporation	Cleveland	\$3,492
EWSSM Family Night	St. Luke's Church	Cleveland	\$8,293
INTERACT Meals and Volunteer Administrator Support	Interreligious Partners in Action of Greater Cleveland	Cleveland	\$4,365
The Lord's Pantry	Kent Social Services Hot Meal Program	Kent	\$2,619
Lakewood Christian Service Center	Lakewood Christian Service Center	Lakewood	\$3,928
Community Hot Meals Program	Church of the Redeemer	Lorain	\$1,746
Grace Parish Food Pantry	Grace Episcopal Church	Mansfield	\$7,420
St. Paul's Food Pantry	St. Paul's Church	Marion	\$2,619
St. Paul's Free Farmer Market	St. Paul's Episcopal Church	Medina	\$3,055
St. Paul's Episcopal Church Sunday Suppers	St. Paul's Episcopal Church	Mt. Vernon	\$2,619
Community Meal/Follow the Son	St. John the Evangelist's Church	Napoleon	\$1,746
St. James Lunch Program	St. James Episcopal Church	Painesville	\$4,365
Feed Your Neighbor	Toledo Area Ministries	Toledo	\$2,619
St. Mark's Community Meals	St. Mark's Episcopal Church	Toledo	\$2,619

**Total \$63,290**

***Health***

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
Teen Moms	Christ Church	Geneva	\$2,828
EMPAC (Emergency Pregnancy Aid Contact)	Emergency Pregnancy Aid Contact	Mansfield	\$1,397
Healthcare Service to the Uninsured	Viola Startzman Free Clinic	Wooster	\$6,320

**Total \$10,545**

***The Church Home: 2009 Services to Seniors***

<i>Program</i>	<i>Agency</i>	<i>City</i>	<i>Grant</i>
OPEN M's Free Clinic	OPEN M	Akron	\$25,000
Share-a-Home of Lake Region, Inc.	St. Peter's Church, Ashtabula	Ashtabula	\$1,320
Senior Outreach Program	Barberton Area Community Ministries	Barberton	\$3,000
STAR Program	St. Thomas Church	Berea	\$2,750
A Place at the Table	Trinity Cathedral	Cleveland	\$7,500
All Faiths Pantry	All Saints Episcopal Church	Cleveland	\$12,000
INTERACT Community Meals Program	Interreligious Partners in Action of Greater Cleveland	Cleveland	\$3,500
Valley Parish Nurse Program	St. Stephen's Episcopal	E Liverpool	\$2,000
Paul's Peers Respite Care	St. Paul's Episcopal Church	Maumee	\$10,000
Oberlin Senior Center - Homemaker Supportive Services	Neighborhood House Association	Oberlin	\$10,000
Portage County Medication Access Program	Family and Community Services, Inc.	Ravenna	\$13,000
SCOPE Harbor Adult Day Care, Warren	SCOPE, Inc. of Trumbull County	Warren	\$17,000
Interfaith Home Maintenance Service, Inc.	St. John's Episcopal Church, Youngstown	Youngstown	\$25,000
Senior Hotline (Senior Services)	Help Hotline Services, Inc.	Youngstown	\$12,000
Volunteer Service to Seniors	HandsOn - Volunteer Network of the Valley	Youngstown	\$7,000

**THE CHURCH HOMETOTAL: \$151,070**

**TOTAL GRANT AWARDS: \$302,200**

Episcopal Community Services Foundation  
Financial Statements (Unaudited)  
For Year 2009

		Grant	Endowment	Total
Assets	Cash and cash equivalents	\$189,935	-	\$189,935
	Marketable securities (at market)	152,533	\$537,118	689,651
	Grants receivable			-
	Pledges receivable	720		720
	Miscellaneous receivables	35		35
	Other receivables, prepaid expense			-
	<b>Total Assets</b>	<b>\$343,223</b>	<b>\$537,118</b>	<b>\$880,341</b>
Liabilities	Accounts Payable	-	-	-
	<b>Total Liabilities</b>	<b>-</b>	<b>-</b>	<b>-</b>
Net Assets	Permanently Restricted		407,148	407,148
	Temporarily Restricted	303,845	119,363	423,208
	Unrestricted	39,378		39,378
	Board Designated		10,607	10,607
	<b>Total Net Assets</b>	<b>\$343,223</b>	<b>\$537,118</b>	<b>\$880,341</b>
	<b>Total Liabilities and Net Assets</b>	<b>\$343,223</b>	<b>\$537,118</b>	<b>\$880,341</b>
Receipts	Contributions, Support			
	Foundation Grants	22,000		22,000
	Gifts, Individuals, Churches	101,630	1,000	102,630
	Other Episcopal Organizations, Funds	91,234		91,234
	Corporations			-
	Diocesan Support			-
	Income			-
	Management fees			-
	Investment Income	330		330
	Campaign receipts			-
	In-kind contributions			-
	Diocese of Ohio			-
	Investment gains (losses)	24,822	87,168	111,990
	<b>Total Receipts</b>	<b>\$240,016</b>	<b>\$88,168</b>	<b>\$328,184</b>
Expenses	Grants	166,014		166,014
	Expenses			-
	Program Expenses		-	-
	In-kind expenses		-	-
	Office expenses		-	-
	Campaign expenses		-	-
	Pledge write - offs		-	-
	Other		-	-
	<b>Total Expenses</b>	<b>166,014</b>	<b>-</b>	<b>166,014</b>
	<b>Change in Net Assets</b>	<b>74,002</b>	<b>88,168</b>	<b>162,170</b>
	<b>Net assets, beginning of year</b>	<b>\$269,221</b>	<b>\$448,950</b>	<b>\$718,171</b>
	<b>Net assets, end of year</b>	<b>\$343,223</b>	<b>\$537,118</b>	<b>\$880,341</b>

**2010 episcopal  
community  
services  
development  
council**

The Rt. Rev. Mark Hollingsworth, Jr., Ex Officio

The Rev. J. Jeffrey Baker, St. Stephens' Shared Ministry, Steubenville, Chair

The Rev. Kay N. Ashby, St. Matthews, Ashland

Mary Ann Caston, Trinity Cathedral

Denise Caywood, St. Philip's Church, Akron

Karen Eubanks, Trinity Church, Findlay

Cheryl Gray, St. Martin's Church, Chagrin Falls

The Rev. Lisa Hackney, St. Paul's Church, Cleveland Heights

Suzanne Palmer, St. Timothy's Church, Macedonia

Anne Schwan, Church of Our Saviour, Akron

George Siss, Church of the Redeemer, Lorain

Roger Smith, St. Peter's Church, Ashtabula

Eugene Stacy, Old Trinity Church, Tiffin

Dick Wilkison, St. Matthews Church, Brecksville

**Staff**

The Rev. Mark K. J. Robinson, Canon for Mission

Lael Carter, Development Officer

Debra Sudy, Administrative Assistant, Mission, Stewardship and Development

**Episcopal Diocese of Ohio  
Holy Cross House - Balance Sheet  
as of December 31, 2009**

	<u>Operating</u>	<u>Endowment</u>	<u>Total</u>
<b>Assets</b>			
JIF Balanced Fund-COST/Unrestricted	\$108,379.82	\$0.00	\$108,379.82
Cash Due To From	\$52,714.93	\$0.00	\$52,714.93
JIF Principal Receivable	\$548.33	\$0.00	\$548.33
JIF Appreciation/Unrestricted	\$44,298.85	\$0.00	\$44,298.85
JIF Money Market/Unrestricted	\$239,262.64	\$0.00	\$239,262.64
Interest in Trust Held by Others	\$0.00	\$506,437.86	\$506,437.86
JIF Balanced Fund-COST/Brd. Des.	\$0.00	\$100,598.03	\$100,598.03
JIF Appreciation/Brd. Des.	\$0.00	\$508,563.36	\$508,563.36
<b>Total Assets</b>	<b>\$445,204.57</b>	<b>\$1,115,599.25</b>	<b>\$1,560,803.82</b>
<b>Liabilities and Fund Balance</b>			
<b>Net Assets</b>			
Net Assets - Unrestricted	\$445,204.57	\$0.00	\$445,204.57
Net Assets - Board Designated	\$0.00	\$609,161.39	\$609,161.39
Net Assets - Permanently Restricted	\$0.00	\$506,437.86	\$506,437.86
<b>Total Net Assets</b>	<b>\$445,204.57</b>	<b>\$1,115,599.25</b>	<b>\$1,560,803.82</b>
<b>Total Liabilities and Net Assets</b>	<b>\$445,204.57</b>	<b>\$1,115,599.25</b>	<b>\$1,560,803.82</b>

**Episcopal Diocese of Ohio**  
**Income Statement - Holy Cross House**  
For the Year Ended December 31, 2009

	<u>Operating</u>	<u>Endowment</u>	<u>Total</u>
<b>Revenues</b>			
Unrealized Gain/Loss - UNR	\$24,845.85	\$0.00	\$24,845.85
Reinvested Income - UNR	\$7,567.21	\$0.00	\$7,567.21
Endowment Income-UNR	\$30,067.68	\$0.00	\$30,067.68
From Outside Trusts - UNR	\$28,223.96	\$0.00	\$28,223.96
Unrealized Gain (Loss) PR	\$0.00	\$68,197.67	\$68,197.67
Unrealized Gain/Loss on Invst. BD	\$0.00	\$99,130.58	\$99,130.58
<b>Total Revenues</b>	<b>\$90,704.70</b>	<b>\$167,328.25</b>	<b>\$258,032.95</b>
<b>Expenses</b>			
Administrative Fees to Operating Budget	\$6,579.96	\$0.00	\$6,579.96
<b>Total Expenses</b>	<b>\$6,579.96</b>	<b>\$0.00</b>	<b>\$6,579.96</b>
 <b>NET SURPLUS/(DEFICIT)</b>	 <b>\$84,124.74</b>	 <b>\$167,328.25</b>	 <b>\$251,452.99</b>



**Episcopal Diocese of Ohio  
The Church Home - Balance Sheet  
as of December 31, 2009**

	<u>Operating</u>	<u>Endowment</u>	<u>Total</u>
<b>Assets</b>			
JIF Balanced Fund-COST/Unrestricted	\$423,389.01	\$0.00	\$423,389.01
Cash Due To From	\$15,752.62	\$0.00	\$15,752.62
JIF Principal Receivable	\$47,000.00	\$0.00	\$47,000.00
JIF Appreciation/Unrestricted	\$14,672.07	\$0.00	\$14,672.07
Interest in Trust Held by Others	\$0.00	\$618,465.72	\$618,465.72
JIF Balanced Fund-COST/Brd. Des.	\$0.00	\$2,372,548.29	\$2,372,548.29
JIF Appreciation/Brd. Des.	\$0.00	\$809,765.06	\$809,765.06
<b>Total Assets</b>	<b>\$500,813.70</b>	<b>\$3,800,779.07</b>	<b>\$4,301,592.77</b>
<b>Liabilities and Net Assets</b>			
<b>Net Assets</b>			
Net Assets - Unrestricted	\$500,813.70	\$0.00	\$500,813.70
Net Assets - Board Designated	\$0.00	\$3,182,313.35	\$3,182,313.35
Net Assets - Permanently Restricted	\$0.00	\$618,465.72	\$618,465.72
<b>Total Net Assets</b>	<b>\$500,813.70</b>	<b>\$3,800,779.07</b>	<b>\$4,301,592.77</b>
<b>Total Liabilities and Net Assets</b>	<b>\$500,813.70</b>	<b>\$3,800,779.07</b>	<b>\$4,301,592.77</b>

**Episcopal Diocese of Ohio**  
**The Church Home - Income Statement**  
For the Year 2009

	<u>Operating</u>	<u>Endowment</u>	<u>Total</u>
<b>Revenues</b>			
Realized Gain/Loss UNR	(\$24,915.38)	\$0.00	(\$24,915.38)
Unrealized Gain/Loss on Invst. - UNR	\$93,528.66	\$0.00	\$93,528.66
Reinvested Income - UNR	\$20,842.61	\$0.00	\$20,842.61
Endowment Income -UNR	\$157,076.04	\$0.00	\$157,076.04
From Outside Trusts - UNR	\$43,884.73	\$0.00	\$43,884.73
Unrealized Gain (Loss) PR	\$0.00	\$81,658.26	\$81,658.26
Unrealized Gain/Loss on Invst. BD	\$0.00	\$517,866.91	\$517,866.91
<b>Total Revenues</b>	<b><u>\$290,416.66</u></b>	<b><u>\$599,525.17</u></b>	<b><u>\$889,941.83</u></b>
<b>Expenses</b>			
Grants to Community Agencies	\$130,820.00	\$0.00	\$130,820.00
Grants to Parish Outreach Programs	\$20,250.00	\$0.00	\$20,250.00
Administrative Fees to Operating Budget	\$36,000.00	\$0.00	\$36,000.00
<b>Total Expenses</b>	<b><u>\$187,070.00</u></b>	<b><u>\$0.00</u></b>	<b><u>\$187,070.00</u></b>
 <b>NET SURPLUS/(DEFICIT)</b>	 <b><u>\$103,346.66</u></b>	 <b><u>\$599,525.17</u></b>	 <b><u>\$702,871.83</u></b>

**Episcopal Diocese of Ohio  
Income Statement-Bishop's Discretionary Fund  
for year ended December 31, 2009**

**Revenues**

Distribution JIF-Unrestricted Custodial Accts	\$11,430.44
Unrealized Gain (Loss) Unrestricted - UNR	\$24,892.32
Gifts-Individuals TR	\$500.00
Misc. Other Income	\$16,129.00
Gifts - Parishes TR	\$140.00
Visitation Collections-TR	\$5,117.70
Gifts - Epis. Org. - TR	\$2,000.00
Grants - Foundations TR	\$5,000.00
<b>Total Revenues</b>	<b><u>\$65,209.46</u></b>

**Expenses**

Grants To Parish Outreach Programs	\$2,500.00
Grants To Assist Seminarians	\$200.00
Grants To Assist Clergy Families	\$1,400.00
ERD Bike Ride	\$14,198.96
Grants To Other Episcopal Institutions	\$4,000.00
Grants For National Programs	\$200.00
Grants For Conferences	\$1,150.00
Diocesan Memberships	\$250.00
Misc. Expense	\$3,334.62
<b>Total Expenses</b>	<b><u>\$27,233.58</u></b>

<b>BEGINNING NET ASSETS</b>	<b>\$196,250.57</b>
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<b>NET SURPLUS/(DEFICIT)</b>	<b><u>\$37,975.88</u></b>
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<b>ENDING NET ASSETS</b>	<b><u><u>\$234,226.45</u></u></b>
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**Episcopal Diocese of Ohio**  
**Kenyon Conference-Income Statement**  
For Year Ended December 31, 2009

	<u>Actual</u>	<u>Annual Budget</u>	<u>Difference</u>
<b>Revenues</b>			
Contributions - Diocese of Ohio	\$10,000.00	\$10,000.00	\$0.00
Contributions - Diocese of Southern Ohio	\$9,430.74	\$10,000.00	(\$569.26)
Unrealized Gain/Loss on Invst.- UNR	\$5,987.25	\$0.00	\$5,987.25
Endowment Income - UNR	\$1,786.92	\$1,800.00	(\$13.08)
Conference Fees	\$8,314.00	\$16,437.50	(\$8,123.50)
Sale of Conference Gifts	\$84.00	\$876.00	(\$792.00)
<b>Total Revenues</b>	<b>\$35,602.91</b>	<b>\$39,113.50</b>	<b>(\$3,510.59)</b>
<b>Expenses</b>			
Bank Fees	\$133.90	\$150.00	\$16.10
Conference Gift Items	\$472.00	\$747.00	\$275.00
Misc. Administration and Publicity	\$35.48	\$1,000.00	\$964.52
Postage	\$0.00	\$200.00	\$200.00
Printing and Brochures	\$0.00	\$850.00	\$850.00
Child Care Expenses	\$165.00	\$450.00	\$285.00
Keynoter Expenses	\$430.74	\$4,000.00	\$3,569.26
Keynoter Honorarium	\$4,500.00	\$1,000.00	(\$3,500.00)
Children's Program Expenses	\$674.16	\$1,000.00	\$325.84
Supplies - Conference Workshop Expenses	\$0.00	\$100.00	\$100.00
Audio/Visual Charges	\$1,621.35	\$500.00	(\$1,121.35)
Evening Programs	\$500.00	\$500.00	\$0.00
Misc. General Conference Expenses	\$472.06	\$650.00	\$177.94
Facilities	\$1,660.00	\$16,060.00	\$14,400.00
Housing Costs	\$3,420.00	\$0.00	(\$3,420.00)
Meals	\$5,314.00	\$0.00	(\$5,314.00)
Miscellaneous Housing and Meals Expense	\$25.00	\$0.00	(\$25.00)
Scholarship Expense	\$0.00	\$1,500.00	\$1,500.00
Mileage - Planning Committee	\$59.81	\$300.00	\$240.19
<b>Total Expenses</b>	<b>\$19,483.50</b>	<b>\$29,007.00</b>	<b>\$9,523.50</b>
 <b>BEGINNING NET ASSETS</b>	 <b>\$30,282.74</b>	 <b>\$0.00</b>	 <b>\$30,282.74</b>
 <b>NET SURPLUS/(DEFICIT)</b>	 <b>\$16,119.41</b>	 <b>\$0.00</b>	 <b>\$16,119.41</b>
 <b>ENDING NET ASSETS</b>	 <b>\$46,402.15</b>	 <b>\$0.00</b>	 <b>\$46,402.15</b>

# **Appendix VI**

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## **2009 Audited Financial Statements**

**Audits for the Diocese of Ohio and the Joint Investment Fund of the Trustees  
of the Diocese of Ohio prepared by Crum, Buchanan & Associates,  
3250 W. Market Street, Suite 209, Akron, Ohio 44333.**

**Signed copies available for inspection at the Diocesan Office.**

**THE DIOCESE OF OHIO**

**FINANCIAL REPORT**

**DECEMBER 31, 2009**

**THE DIOCESE OF OHIO**

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**FINANCIAL STATEMENTS**

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**INDEPENDENT AUDITORS' REPORT ON SUPPLEMENTARY  
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**SUPPLEMENTARY INFORMATION**

Details of statement of activities  
Details of changes in net assets - Operating Funds  
Details of changes in net assets - Special Purpose  
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**CRUM,  
BUCHANAN &  
ASSOCIATES**  
*Certified Public Accountants*

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The Diocesan Council  
The Diocese of Ohio  
Cleveland, Ohio

Independent Auditors' Report

We have audited the accompanying statement of financial position of The Diocese of Ohio as of December 31, 2009, and the related statements of activities and cash flows for the year then ended. These financial statements are the responsibility of the Diocese's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Diocese of Ohio as of December 31, 2009, and the changes in its net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

*Crum, Buchanan & Associates*

August 16, 2010



THE DIOCESE OF OHIO  
STATEMENT OF FINANCIAL POSITION  
December 31, 2009

	Operating Funds	Special Purpose	Endowment Funds	Total
<b>ASSETS</b>				
<b>Current Assets:</b>				
Cash and equivalents	\$ 450,049	\$ 330,820	\$ 100,376	\$ 881,245
Marketable securities - Joint Investment Fund (Note 3)	-	1,137,435	-	1,137,435
Receivables:				
Pledges (Note 5)	-	27,037	12,000	39,037
Assessments	201,080	-	-	201,080
Interest and other	116,836	108,296	5,362	230,494
Loans and notes (Note 6)	12,231	56,737	-	68,968
Total receivables	\$ 330,147	\$ 192,070	\$ 17,362	\$ 539,579
Inventory	101,785	-	-	101,785
Other	49,776	-	-	49,776
<b>Total current assets</b>	<b>\$ 931,757</b>	<b>\$ 1,660,325</b>	<b>\$ 117,738</b>	<b>\$ 2,709,820</b>
<b>Property and Equipment:</b>				
Land and buildings	\$ 1,803,199	\$ -	\$ -	\$ 1,803,199
Building furnishings and equipment	86,574	-	-	86,574
Office and computer equipment	162,123	-	-	162,123
Vehicles and other	203,224	-	-	203,224
Trinity Commons Project (Note 8)	-	5,313,425	-	5,313,425
	\$ 2,255,120	\$ 5,313,425	\$ -	\$ 7,568,545
Less: accumulated depreciation	1,481,995	1,292,026	-	2,774,021
<b>Total property and equipment</b>	<b>\$ 773,125</b>	<b>\$ 4,021,399</b>	<b>\$ -</b>	<b>\$ 4,794,524</b>
<b>Other Assets:</b>				
Pledges receivable (Note 5)	\$ -	\$ 254,938	\$ 37,771	\$ 292,709
Loans and notes receivable (Note 6)	45,715	41,537	-	87,252
Marketable securities - Joint Investment Fund (Note 3)	600,659	5,498,016	19,246,697	25,345,372
Perpetual trusts (Note 4)	-	469,830	1,692,589	2,162,419
Other investments (Note 3)	-	99,638	821,800	921,438
<b>Total other assets</b>	<b>\$ 646,374</b>	<b>\$ 6,363,959</b>	<b>\$ 21,798,857</b>	<b>\$ 28,809,190</b>
<b>Total assets</b>	<b>\$ 2,351,256</b>	<b>\$ 12,045,683</b>	<b>\$ 21,916,595</b>	<b>\$ 36,313,534</b>
<b>LIABILITIES</b>				
<b>Current Liabilities:</b>				
Accounts payable	\$ 139,180	\$ 83	\$ 107	\$ 139,370
Grants payable (Note 7)	-	11,828	-	11,828
Deposits and other	9,278	4,395	-	13,673
<b>Total current liabilities</b>	<b>\$ 148,458</b>	<b>\$ 16,306</b>	<b>\$ 107</b>	<b>\$ 164,871</b>
<b>Grants Payable (Note 7)</b>	<b>\$ -</b>	<b>\$ 169,959</b>	<b>\$ -</b>	<b>\$ 169,959</b>
<b>NET ASSETS</b>				
<b>Unrestricted</b>				
Board designated, including operating reserves of \$886,823	\$ 886,823	\$ 693,129	\$ 6,922,413	\$ 8,502,365
Unrestricted	1,315,975	5,883,711	-	7,199,686
Total unrestricted	\$ 2,202,798	\$ 6,576,840	\$ 6,922,413	\$ 15,702,051
Temporarily restricted (Note 9)	-	4,796,996	6,347,456	11,144,452
Permanently restricted (Note 10)	-	485,582	8,646,619	9,132,201
<b>Total net assets</b>	<b>\$ 2,202,798</b>	<b>\$ 11,859,418</b>	<b>\$ 21,916,488</b>	<b>\$ 35,978,704</b>
<b>Total liabilities and net assets</b>	<b>\$ 2,351,256</b>	<b>\$ 12,045,683</b>	<b>\$ 21,916,595</b>	<b>\$ 36,313,534</b>

THE DIOCESE OF OHIO  
STATEMENT OF ACTIVITIES  
Year Ended December 31, 2009

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>REVENUE AND SUPPORT</b>				
Assessments	\$ 2,380,293	\$ -	\$ -	\$ 2,380,293
Cedar Hills	95,022	-	-	95,022
Joint Investment Fund income	775,517	452,017	-	1,227,534
Net realized and unrealized gains on investments	2,614,179	1,655,946	-	4,270,125
Appreciation on funds held in trust	-	-	289,861	289,861
Interest and dividend income	155,639	27,355	-	182,994
Other income	225,507	158,087	410,142	793,736
Contributions and offerings	61,169	461,681	30,783	553,633
Sacred Path	138,380	-	-	138,380
Net assets released from restrictions	1,016,391	(1,016,391)	-	-
<b>Total revenue and support</b>	<b>\$ 7,462,097</b>	<b>\$ 1,738,695</b>	<b>\$ 730,786</b>	<b>\$ 9,931,578</b>
<b>EXPENSES</b>				
Anglican commitments	\$ 682,567	\$ -	\$ -	\$ 682,567
Clergy	23,122	-	-	23,122
Congregations	213,307	-	-	213,307
Specialized ministries	40,196	-	-	40,196
Technical support and services	2,289,187	-	-	2,289,187
Cedar Hills	322,993	-	-	322,993
Sacred Path	189,066	-	-	189,066
Capital grants	16,647	-	-	16,647
Educational scholarships and grants	155,138	-	-	155,138
Other grants	614,546	-	-	614,546
Special assistance to clergy	11,343	-	-	11,343
Depreciation	261,773	-	-	261,773
Other	251,421	-	-	251,421
<b>Total expenses</b>	<b>\$ 5,071,306</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 5,071,306</b>
<b>CHANGE IN NET ASSETS</b>	<b>\$ 2,390,791</b>	<b>\$ 1,738,695</b>	<b>\$ 730,786</b>	<b>\$ 4,860,272</b>
<b>NET ASSETS AT BEGINNING OF YEAR</b>	<b>13,314,460</b>	<b>9,402,557</b>	<b>8,401,415</b>	<b>31,118,432</b>
<b>NET ASSETS BEFORE OTHER ADJUSTMENTS</b>	<b>\$15,705,251</b>	<b>\$11,141,252</b>	<b>\$ 9,132,201</b>	<b>\$35,978,704</b>
<b>TRANSFERS AMONG FUNDS</b>	<b>(3,200)</b>	<b>3,200</b>	<b>-</b>	<b>-</b>
<b>OWNERSHIP ALLOCATION ADJUSTMENT (Note 9)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>NET ASSETS AT END OF YEAR</b>	<b>\$15,702,051</b>	<b>\$11,144,452</b>	<b>\$ 9,132,201</b>	<b>\$35,978,704</b>

THE DIOCESE OF OHIO  
STATEMENT OF CASH FLOWS  
Year Ended December 31, 2009

<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>	
Change in net assets	\$ 4,860,272
Adjustments to reconcile change in net assets to net cash from operating activities:	
Depreciation	261,773
Net realized and unrealized gains on investments	(4,270,125)
Appreciation on funds held in trust	(289,861)
Ownership allocation adjustment	-
Contributions restricted for long-term investment	(30,783)
Change in operating assets and liabilities:	
Assessment receivables	31,492
Pledges receivables	5,742
Interest and other receivables	19,298
Loans and notes receivable	49,459
Inventory	(4,118)
Other assets	(32,194)
Accounts payable	3,111
Grants payable	(2,635)
Deposits and other	(6,663)
Total adjustments	<u>\$ (4,265,504)</u>
Net cash provided by operating activities	\$ 594,768
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>	
Sales of other investments	\$ 40,000
Purchases of other investments	(504,711)
Gain on disposal of property and equipment	(1,456)
Purchases of property and equipment	(16,712)
Sales of marketable securities	486,999
Purchases of marketable securities	<u>(744,615)</u>
Net cash used in investing activities	\$ (740,495)
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>	
Contributions restricted for long-term investment	<u>\$ 30,783</u>
Net cash provided by financing activities	<u>\$ 30,783</u>
<b>NET DECREASE IN CASH AND EQUIVALENTS</b>	\$ (114,944)
<b>CASH AND EQUIVALENTS AT BEGINNING OF YEAR</b>	<u>996,189</u>
<b>CASH AND EQUIVALENTS AT END OF YEAR</b>	<u>\$ 881,245</u>
 Supplemental disclosure of cash flow information - cash paid during the year for interest	 <u>\$ -</u>

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 1. Organization and Purpose**

The Diocese of Ohio (the "Diocese ") qualifies under Internal Revenue Code Section 501 (c) (3) and is, therefore, exempt from federal income taxes under Section 501(a). The Diocese is a not-for-profit organization that provides administrative support and spiritual leadership for the existing parishes and parish organizations subject to the jurisdiction of the Diocese or affiliated with the Protestant Episcopal Church.

The financial statements of the Diocese do not include the assets of existing parishes and parish organizations. Title to the real estate, other property, and assets of defunct churches are held in trust by the Trustees of the Diocese of Ohio, a related party, pending disposition of the assets and are not included in these financial statements.

The Diocese is affiliated with related organizations that were organized by the Diocese for various purposes. These organizations include the Diocese of Ohio Episcopal Community Services Foundation (the "Foundation"), The Church Home, and the Holy Cross House for Crippled and Invalid Children ("Holy Cross House"). Accounting and operational control was assumed by the Diocese in 2003. The Diocese has included in the financial statements all activity of the Foundation, The Church Home, and Holy Cross House.

In order to assume observance of limitation and restrictions placed on the use of resources available to the Diocese, the accounts of the Diocese are classified for accounting and reporting purposes into fund groups that are in accordance with specific activities or objectives depending on the various purposes to which the resources relate. Separate accounts are maintained for each fund group; however, in the accompanying financial statements, they have been presented in one of three fund groups: Operating, Special Purpose, or Endowment, according to the characteristics of each fund group. Within each fund group, net assets restricted by donors are presented as temporarily or permanently restricted. Donor restricted net assets may only be utilized for the donor's intended purpose and/or in accordance with the donor's time restrictions. The Diocese retains full control over unrestricted net assets for use in achieving any of its organizational purposes. Reserves represent the portion of net assets designated by the Diocese for specific purposes.

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

- A. Contributions - Contributions of cash and other assets, including unconditional promises to give in the future, are reported as revenue when received, and measured at fair value. Contributions without donor-imposed restrictions

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 2. Summary of Significant Accounting Policies (Continued)**

- A. Contributions (Continued)  
and contributions with donor-imposed time or purpose restrictions that are met in the same period as the gift are both reported as unrestricted support. Donor promises to give in the future (a period exceeding one year from the date of the statement of financial position) are recorded at the present value of estimated future cash flows. Other restricted gifts are reported as restricted support and temporarily or permanently restricted net assets.
- B. Cash Equivalents - The Diocese considers all highly liquid investments available for current use with an original maturity of three months or less to be cash equivalents. The Diocese maintains at various financial institutions cash and equivalents which may exceed federally insured amounts at times and which may, at times, significantly exceed statement of financial position amounts due to outstanding checks.
- C. Marketable Securities - The Diocese records marketable securities at their quoted market prices. These monies are principally invested in the Joint Investment Fund of the Trustees of the Diocese of Ohio, a related party. Assets of the Joint Investment Fund are invested in U.S. government securities actively traded stocks, corporate bonds, and mutual funds. Changes in unrealized net gains and losses from investments represent changes in the difference between market values and cost and are included in the statement of activities.
- D. Assessments Receivable - Assessments receivable represent assessments due from parishes as required under the Diocesan canons. The assessments are based on the Normal Operating Income of each parish as defined in the annual Parochial Report completed by each parish and are due on a monthly basis.
- E. Property and Equipment - Land, buildings and equipment are recorded at cost. Buildings, equipment and vehicles are depreciated using the straight-line method over the assets' estimated useful lives ranging from 3-40 years. Maintenance, repairs and minor renewals are charged to expense when incurred.
- F. Inventory - Inventory consists of merchandise held for sale and supply items used in programs. Inventory is stated at cost.
- G. Classification of Net Assets - Net assets are classified as unrestricted, temporarily restricted, or permanently restricted depending on the presence and characteristics of donor-imposed restrictions limiting the ability to use or dispose

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 2. Summary of Significant Accounting Policies (Continued)**

- G. Classification of Net Assets (Continued)  
of contributed assets or the economic benefits embodied in those assets. Donor-imposed restrictions that expire with the passage of time or that can be removed by meeting certain requirements result in temporarily restricted net assets. Earnings and unrealized and realized gains and losses on temporarily or permanently restricted net assets are classified as unrestricted unless restricted by the donor or by applicable state law.
- H. Allocation of Expenses - Direct costs of providing the Diocese's various programs and other activities have been summarized on a functional basis in Note 12. Accordingly, certain costs have been allocated among the program and support services benefited. Although the methods of allocation used are considered appropriate, other methods could be used that would produce a different result.
- I. Estimates - The preparation of financial statement in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. These estimates include the collectability of receivables and the present value discount of long-term pledges.

**Note 3. Marketable Securities**

Cost and quoted market values (carrying value) of investments at December 31, 2009:

	Cost	Market Value
Joint Investment Fund	\$ 14,795,033	\$ 26,482,807
Mutual Fund & Trust Fund	1,102,781	921,438
	<u>\$ 15,897,814</u>	<u>\$ 27,404,245</u>

The Diocese participates in the Joint Investment Fund. This fund is an investment fund administered by the Trustees of the Diocese of Ohio, a related party, for the invested funds of the Diocese, existing parishes, parish organizations, and any not-for-profit organizations subject to the jurisdiction of the Diocese.

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 4. Perpetual Trusts**

The Diocese, The Church Home and the Holy Cross House are irrevocable beneficiaries of several perpetual trusts. At December 31, 2009, the market value of these beneficial interests totaled \$2,162,419.

**Note 5. Pledges Receivable**

During 2000, the Diocese began its Legacy Campaign to raise funds for program endowments and the Trinity Commons Project, which is more fully described in Note 9. At December 31, 2009, pledges receivable resulting from the campaign have been reported net of a 5% discount rate, which will be amortized as revenue and support over the life of these pledges. Pledge receivables are currently expected to be collectible as follows:

	Trinity Commons	Legacy Campaign	Bishop's Annual Appeal & Other	Total
2010	\$ 17,742	\$ 10,000	\$ 11,295	\$ 39,037
2011	17,742	10,000	2,000	29,742
2012	122,455	10,000	2,000	134,455
2013	-	10,000	-	10,000
2014	-	10,000	-	10,000
Thereafter	404,043	-	-	404,043
Pledges receivable	561,982	50,000	15,295	627,277
Present value discount	(289,302)	(6,229)	-	(295,531)
Present value of pledges	<u>\$ 272,680</u>	<u>\$ 43,771</u>	<u>\$ 15,295</u>	<u>\$ 331,746</u>

**Note 6. Loans and Notes Receivable**

With approval of the Diocesan Council, The Diocese makes loans from special funds set aside for that purpose to the parishes as a means of financing construction of new buildings and improvements to existing buildings. Each of these loans has a repayment schedule; however, this schedule is not strictly adhered to if it would present an undue hardship to the parish. While the realization term of these loans may be extended, the Diocese monitors these loans closely and anticipates that all loans will be repaid. All outstanding loans to parishes bear interest at rates between 4% and 5%.

**Note 7. Grants Payable**

At December 31, 2009, the Diocese has committed \$181,787 (exclusive of its ownership portion) to support the Trinity Commons project. These amounts have been reported net of a discount rate of 5% and are payable as follows:

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 7. Grants Payable (Continued)**

2010	\$ 11,828
2011	10,728
2012	70,521
2013	-
2014	-
Thereafter	88,710
	<u>\$ 181,787</u>

**Note 8. Trinity Commons Project**

The Diocese entered into a joint ownership agreement with Trinity Cathedral (the "Cathedral") for ownership, operation, and management of a building project known as Trinity Commons. This fulfills a common goal of the Diocese and the Cathedral of developing and operating a religious and community outreach campus. The project was completed and placed in service January 1, 2003.

The Diocese and the Cathedral each have an individual 50% leasehold interest in the property as well an undivided 50% ownership interest in the improvements comprising the project.

The total project cost, including equipment and furnishing, was approximately \$10,600,000. The source of funds for the construction, equipping, and ongoing operating of the project are charitable gifts and grants as received through the Legacy pledge campaign (Note 5), investment by both the Diocese and Cathedral, bank financing, and operating revenues the project generates, including revenues from third-party rentals.

Project expenses and other required funds for the project or the property are proportioned on a basis of 33.33% to the Diocese and 66.67% to the Cathedral, or as adjusted by the operating agreement in place. For the year 2009, no ownership allocation adjustment is reflected in the financial statements.



**THE DIOCESE OF OHIO**

**NOTES TO FINANCIAL STATEMENTS**

**Note 9. Temporarily Restricted Net Assets**

Net assets restricted by donors are summarized as follows:

**Special Purpose:**

Education - scholarships and loans	\$ 248,391
Loans to parishes for financing of new construction and improvements to existing buildings	1,633,110
Proceeds and trusts from St. John's Home	1,017,383
Support for missions	139,354
Episcopate support	4,101
Support and general welfare of the needy	8,553
Support for the advancement of the work of the Protestant Episcopal Church among African- Americans in Cleveland	30,219
Cedar Hills - Burroughs Hall gift	509,335
Cemetery lot maintenance	10,506
Kenyon Summer conference	43,238
To provide funds for institutional chaplains and to address human needs or special projects	6,763
For support of Bishop's office and Bishop's discretionary use	189,233
Support of chaplaincy at Kenyon College	5,218
Trinity Commons project	7,563
Cedar Hills scholarship fund	1,277
Youth scholarships	3,126
Legacy Campaign - Greater Akron congregational development	100,000
Cedar Hills - Emily Murray	24,605
Disabled and infirm clergy	77,261
Lloyd O'Keefe Fellowship	6,160
Support of nursing home costs for needy elderly women	7,674
Cedar Hills - Master Plan	11,571
ECSF - Work among the aged	113,155
ECSF - Annual Campaign	172,269
Bishop's Annual Appeal	248,335
Support of parishes	31,965
Support of St. John's, Cleveland	146,631
Total for Special Purpose	\$ 4,796,996

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 9. Temporarily Restricted Net Assets (Continued)**

**Endowment Funds - Accumulated Earnings and Appreciation  
on Permanently Restricted Funds:**

ECSF - for administration	\$ 118,582
Episcopate support	2,034,388
Support for capital grants	33,850
Support for college chaplaincies	36,973
Support for congregations and leadership development	308,718
Support for hospital chaplaincies	1,284
Support for operations	4,740
Support for St. John's Home	757,746
Support for the disabled and infirmed clergy	417,836
Support of Bexley Hall	25,231
Support of Bishop's office	30,087
Support of Cedar Hills	257,002
Support of education	1,393,510
Support of missions	667,133
Support of the general welfare of the needy	256,027
Support of youth scholarships	4,349
Total for Endowment Funds	<u>\$ 6,347,456</u>
Total temporarily restricted net assets	<u>\$ 11,144,452</u>

**Note 10. Permanently Restricted Net Assets**

Net assets restricted by donors for investment in perpetuity are available for the following purposes:

**Special Purpose:**

Support of St. John's, Cleveland	\$ 469,831
Support of Christ Church, Lima	15,751
Total for Special Purpose	<u>\$ 485,582</u>

**Endowment Funds:**

ECSF - for administration	\$ 491,320
ECSF - for outreach	7,646
Interest in Rhodes' trust	479,735
Support for Bexley Hall seminary	5,541

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 10. Permanently Restricted Net Assets (Continued)**

Support for capital grants	667,409
Support for church organizations	190,932
Support for college chaplaincies	389,200
Support for congregational development	85,156
Support for hospital chaplaincies	4,925
Support for leadership development	292,370
Support for nursing home costs of elderly women	50,000
Support for operations	31,555
Support for St. John's Home	155,732
Support for the disabled and infirmed clergy	96,731
Support for youth scholarships	33,906
Support of Cedar Hills	208,158
Support of education	1,794,339
Support of missions	297,865
Support of the Episcopate	2,104,311
Support of the general welfare of the needy	134,884
The Church Home	618,466
The Holy Cross House	506,438
Total for Endowment Funds	<u>\$ 8,646,619</u>
 Total permanently restricted assets	 <u>\$ 9,132,201</u>

**Note 11. Employee Benefits Plans**

All clergy of the Diocese are covered by a defined benefit pension plan administered by the National Church, requiring contributions at 18% of compensation, which totaled \$94,119 in 2009. The pension plan's assets exceeded the actuarially computed present value of accumulated benefits as of March 31, 2010, the date of the last actuarial valuation. In the event of withdrawal from the plan and under certain circumstances, a contributor to a multiple employer plan may be liable for a portion of any under funded status. The assumed rate of return used in the valuation was 5.75%. Information as to the actuarial present value of vested and nonvested accumulated plan benefits and the plan's net assets available for benefits attributable to employees of the Diocese is not available since the National Church does not compute it for each participating diocese.

All lay employees are covered by a noncontributory defined contribution plan sponsored by the Diocese. Under the plan provisions, the Diocese contributes 9.79% of eligible participants' compensation as defined in the plan document. During 2009, the Diocese paid \$50,670 to the plan.

THE DIOCESE OF OHIO  
NOTES TO FINANCIAL STATEMENTS

**Note 12. Functional Expenses**

The functionalization of expenses is as follows:

Program	\$ 4,001,798
General and administrative	1,034,845
Fundraising	<u>34,663</u>
Total expenses	<u>\$ 5,071,306</u>

**Note 13. Endowment Funds**

The endowment funds of the Diocese include donor-restricted endowment funds. Net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

**Interpretation of Relevant Law**

The Trustees of the Diocese of Ohio have interpreted the Uniform Prudent Management of Institutional Funds Act (UPMIFA) as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Diocese classifies as permanently restricted net assets a) the original value of gifts donated to the permanent endowment, b) the original value of subsequent gifts to the permanent endowment, c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporary restricted net assets until those amounts are appropriated for expenditure by the organization in a manner consistent with the standard of prudence prescribed by UPMIFA. In accordance with UPMIFA, the organization considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- 1) the duration and preservation of the fund
- 2) the purposes of the organization and the donor-restricted endowment fund
- 3) general economic conditions
- 4) the possible effect of inflation and deflation
- 5) the expected total return from income and the appreciation of investments

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 13. Endowment Funds (Continued)**

- 6) other resources of the organization
- 7) the investment policies of the organization

**Endowment Net Asset Composition by Type of Fund as of December 31, 2009**

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Board-designated endowment funds	\$ 6,922,413	\$ -	\$ -	\$ 6,922,413
Donor-restricted endowment funds	-	6,347,456	8,646,619	14,994,075
<b>Total</b>	<b>\$ 6,922,413</b>	<b>\$ 6,347,456</b>	<b>\$ 8,646,619</b>	<b>\$ 21,916,488</b>

**Changes in Endowment Net Assets for the Calendar Year Ended December 31, 2009**

	Donor Restricted Endowment Funds	Board Designated Endowment Funds	Total
Endowment net assets - Beginning of year	\$ 13,110,191	\$ 5,225,115	\$ 18,335,306
<b>Investment return</b>			
Investment income	\$ 119,205	\$ -	\$ 119,205
Net appreciation (realized and unrealized)	1,877,992	1,697,298	3,575,290
Total investment return	\$ 1,997,197	\$ 1,697,298	\$ 3,694,495
Contributions to perpetual endowments	30,783	-	30,783
Amounts appropriated for expenditure	(144,096)	-	(144,096)
<b>Endowment net assets - End of year</b>	<b>\$ 14,994,075</b>	<b>\$ 6,922,413</b>	<b>\$ 21,916,488</b>

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 13. Endowment Funds (Continued)**

**Funds with Deficiencies**

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level that the donor or the Uniform Prudent Management of Institutional Funds Act (UPMIFA) requires the Diocese to retain as a fund of perpetual duration. In accordance with GAAP, deficiencies of this nature that are reported in unrestricted net assets were \$236,280 as of December 31, 2009. These deficiencies resulted from unfavorable market fluctuations that occurred shortly after the investment of new permanently restricted contributions and continued appropriation of certain programs that was deemed prudent by the Trustees of the Diocese of Ohio.

**Return Objectives and Risk Parameters**

The Trustees of the Diocese of Ohio have adopted investment and spending policies for both donor-restricted and Board-designated special purpose and endowment assets invested in the Joint Investment Fund. These policies, which are enumerated in the Statement of Spending and Investment Policy, were adopted in September 2008 and attempt to provide a predictable stream of funding to programs supported by these assets. Under this policy, the endowment and special purpose funds are invested in a manner to achieve the objective of an annual return that is at least 4-6% greater than the rate of inflation as measured by the Consumer Price Index (CPI), while investing with sufficient diversification to minimize the risk of large losses to the fund. Actual return of the Fund may vary from this objective.

**Strategies Employed for Achieving Objectives**

In order to satisfy its long-term investment objectives, the Trustees rely on a total return orientation that attempts to achieve investment returns through both income and growth. The Spending and Investment Policy includes asset allocation guidelines for domestic and international equity, cash and fixed income, and alternative investments. A target allocation percentage as well as tolerance ranges are identified for each asset group. A combination of actively managed accounts and passive investments has been selected to implement the asset allocation. The guidelines have been implemented by the investment managers and reviewed by the Trustees annually, or more

**THE DIOCESE OF OHIO**

**NOTES TO FINANCIAL STATEMENTS**

**Note 13. Endowment Funds (Continued)**

**Strategies Employed for Achieving Objectives (Continued)**

frequently if needed. The Policy also describes the benchmark used to measure Fund performance.

The Trustees have also adopted policies for socially responsible investing. These policies prohibit the direct investment in tobacco and gaming companies. The Trustees have hired investment advisers who monitor compliance with the socially responsible investment policies and report their findings to the Trustees.

**Spending Policy and How the Investment Objectives  
Relate to the Policy**

As of June 30th of each year, the Trustees determine the average unit value for the Fund for the 12 previous calendar quarters ending on that date. A spending rate is then applied to the average unit value to determine the annual income to participants for the subsequent calendar year. For the year 2009, the Trustees approved a spending rate of 4%. This rate is evaluated annually by the Trustees and is subject to change.

**UPMIFA Interpretation**

In April 2009, the State of Ohio enacted the UPMIFA. The Trustees have interpreted the Ohio version of UPMIFA to preserve only the fair value of the original gift, as determined at the date of the original gift.

**Note 14. Fair Value**

As of January 1, 2008, the Diocese adopted Statement of Financial Accounting Standards No. 157 (SFAS 157), Fair Value Measurements. SFAS 157 clarifies the definition of fair value measurements. The standard applies under other accounting pronouncements that require or permit fair value

THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 14. Fair Value (Continued)**

Assets Measured at Fair Value on a Recurring Basis at December 31, 2009

	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Balance at December 31, 2009
<b>Assets</b>			
Joint Investment Fund (Note 3)	\$ -	\$26,482,807	\$26,482,807
Perpetual Trusts (Note 4)	-	2,162,419	2,162,419
St. John's Endowment	-	99,638	99,638
Mutual Fund (Note 3)	821,800	-	821,800
Total	<u>\$ 821,800</u>	<u>\$28,744,864</u>	<u>\$29,566,664</u>



THE DIOCESE OF OHIO

NOTES TO FINANCIAL STATEMENTS

**Note 14. Fair Value (Continued)**

measurements and does not require any new fair value measurements. The provisions of SFAS 157 are effective prospectively for periods beginning January 1, 2008 for financial assets and liabilities and for periods beginning January 1, 2009 for nonfinancial assets and liabilities as a result of the deferral of the effective date of SFAS 157 provided by FSP FAS 157-2. The implementation of the provisions of SFAS 157 for financial assets and liabilities as of January 1, 2008 did not have a material impact on the Diocese's financial statements.

The following table presents information about the Diocese's assets measured at fair value on a recurring basis at December 31, 2009, and the valuation techniques used by the Diocese to determine those fair values.

In general, fair values determined by Level 1 inputs use quoted prices in active markets for identical assets that the Diocese has the ability to access.

Fair values determined by Level 2 inputs use other inputs that are observable, either directly or indirectly. These Level 2 inputs include quoted prices for similar assets and liabilities in active markets, and other inputs such as interest rates and yield curves that are observable at commonly quoted intervals. The Diocese's investment in the Joint Investment Fund, its interest in seven perpetual trusts, and a trust held at Key Bank on behalf of St. John's, Cleveland are categorized as Level 2 assets.

Level 3 inputs are unobservable inputs, including inputs that are available in situations where there is little, if any, market activity for the related asset. The Diocese does not currently hold any Level 3 assets.

In instances where inputs used to measure fair value fall into different levels in the above fair value hierarchy, fair value measurements in their entirety are categorized based on the lowest level input that is significant to the valuation. The Diocese's assessment of the significance of particular inputs to these fair value measurements requires judgment and considers factors specific to each asset.

**CRUM,  
BUCHANAN &  
ASSOCIATES**  
*Certified Public Accountants*

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The Diocesan Council  
The Diocese of Ohio  
Cleveland, Ohio

Our audit was made for the purpose of forming an opinion on the basic financial statements taken as a whole. The supplementary information on pages        for the year ended December 31, 2009 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated in all material respects in relation to the basic financial statements taken as a whole.

*Crum, Buchanan & Associates*

August 16, 2010

THE DIOCESE OF OHIO  
DETAILS OF STATEMENT OF ACTIVITIES  
Year Ended December 31, 2009

	OPERATING FUNDS			SPECIAL PURPOSE			ENDOWMENT FUNDS		
	Unrestricted	Temporarily Restricted	Total	Unrestricted	Board Designated	Total	Temporarily Restricted	Permanently Restricted	Total
REVENUE AND SUPPORT									
Assessments	\$ 2,380,293	\$ -	\$ 2,380,293	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cedar Hills	95,022	-	95,022	-	-	-	-	-	95,022
Joint Investment Fund income	444,960	-	444,960	293,285	33,273	326,558	340,041	-	115,975
Net realized and unrealized losses on investments	97,747	-	97,747	711,872	107,190	819,062	8,199	1,647,747	3,345,117
Appreciation on funds held in trust	-	-	-	-	-	-	-	230,173	289,861
Interest and dividend income	40,010	-	40,010	100,767	11,797	112,564	27,250	105	182,994
Other income	174,135	-	174,135	51,372	-	51,372	138,087	-	793,736
Contributions and offerings	39,395	-	39,395	13,861	7,913	21,774	461,681	-	553,633
Sacred Path	138,380	-	138,380	-	-	-	-	30,783	138,380
Net assets released from restrictions	-	-	-	967,478	(87,987)	879,491	(879,491)	-	-
Total revenue and support	\$ 3,409,942	\$ -	\$ 3,409,942	\$ 2,138,575	\$ 72,186	\$ 2,210,761	\$ 115,767	\$ 260,956	\$ 3,725,278
EXPENSES									
Anglican commitments	\$ 682,567	\$ -	\$ 682,567	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Clergy	23,122	-	23,122	-	-	-	-	-	23,122
Congregations	213,307	-	213,307	-	-	-	-	-	213,307
Specialized ministries	38,009	-	38,009	-	-	-	-	-	40,196
Technical support and services	2,051,516	-	2,051,516	237,671	-	237,671	-	-	2,289,187
Cedar Hills	322,993	-	322,993	-	-	-	-	-	322,993
Sacred Path	189,066	-	189,066	-	-	-	-	-	189,066
Capital grants	-	-	-	16,647	-	16,647	-	-	16,647
Educational scholarships and grants	-	-	-	155,138	-	155,138	-	-	155,138
Other grants	-	-	-	483,239	-	483,239	-	-	614,546
Special assistance to clergy	-	-	-	11,343	-	11,343	-	-	11,343
Depreciation	80,076	-	80,076	181,697	-	181,697	-	-	261,773
Other	-	-	-	241,419	-	241,419	-	-	251,421
Total expenses	\$ 3,600,656	\$ -	\$ 3,600,656	\$ 1,327,154	\$ -	\$ 1,327,154	\$ -	\$ -	\$ 143,496
CHANGE IN NET ASSETS	\$ (190,714)	\$ -	\$ (190,714)	\$ 811,421	\$ 72,186	\$ 883,607	\$ 115,767	\$ 1,622,928	\$ 3,581,782
NET ASSETS AT BEGINNING OF YEAR	2,325,575	-	2,325,575	5,142,827	620,943	5,763,770	4,678,029	8,385,663	18,335,306
NET ASSETS BEFORE OTHER ADJUSTMENTS	\$ 2,134,861	\$ -	\$ 2,134,861	\$ 5,954,248	\$ 693,129	\$ 6,647,377	\$ 4,793,796	\$ 8,646,619	\$ 21,917,088
OWNERSHIP ALLOCATION ADJUSTMENT	-	-	-	-	-	-	-	-	-
TRANSFERS AMONG FUNDS	67,937	-	67,937	(70,537)	-	(70,537)	1,200	-	(600)
NET ASSETS AT END OF YEAR	\$ 2,202,798	\$ -	\$ 2,202,798	\$ 5,883,711	\$ 693,129	\$ 6,576,840	\$ 4,796,996	\$ 8,646,619	\$ 21,916,488

THE DIOCESE OF OHIO  
DETAILS OF CHANGES IN NET ASSETS - OPERATING FUNDS  
Year Ended December 31, 2009

	DIOCESAN/MISSIONARY		OPERATING FUNDS			SACRED PATH BOOKS & ART			
	Unrestricted	Unrestricted - Property	Unrestricted	Unrestricted - Property	Unrestricted	Unrestricted	Temporarily		Total
							Restricted	Restricted	
<b>REVENUE AND SUPPORT</b>									
Assessments	\$2,380,293	\$ -	\$2,380,293	\$ -	\$ -	\$ -	\$ -	\$ -	\$2,380,293
Cedar Hills	-	-	-	-	95,022	-	-	-	95,022
Joint Investment Fund income	415,252	-	415,252	-	29,708	-	-	-	444,960
Net realized and unrealized losses on investments	97,747	-	97,747	-	-	-	-	-	97,747
Interest and dividend income	40,000	-	40,000	-	-	-	-	-	40,010
Other income	173,835	300	174,135	-	-	10	-	10	174,135
Contributions and offerings	2,640	-	2,640	-	11,397	25,358	-	25,358	39,395
Sacred Path	-	-	-	-	-	138,380	-	138,380	138,380
Net assets released from restrictions	-	-	-	-	-	-	-	-	-
<b>Total revenue and support</b>	<b>\$3,109,767</b>	<b>\$ 300</b>	<b>\$3,110,067</b>	<b>\$ 136,127</b>	<b>\$ 136,127</b>	<b>\$ 163,748</b>	<b>\$ -</b>	<b>\$ 163,748</b>	<b>\$3,409,942</b>
<b>EXPENSES</b>									
Anglican commitments	\$ 682,567	\$ -	\$ 682,567	\$ -	\$ -	\$ -	\$ -	\$ -	\$682,567.0
Clergy	23,122	-	23,122	-	-	-	-	-	23,122
Congregations	213,307	-	213,307	-	-	-	-	-	213,307
Specialized ministries	38,009	-	38,009	-	-	-	-	-	38,009
Technical support and services	2,051,516	-	2,051,516	-	-	-	-	-	2,051,516
Cedar Hills	-	-	-	-	322,993	-	-	-	322,993
Sacred Path	-	-	-	-	-	189,066	-	189,066	189,066
Other grants	-	-	-	-	-	-	-	-	-
Depreciation & loss on disposals	-	13,713	13,713	66,363	-	-	-	-	80,076
<b>Total expenses</b>	<b>\$3,008,521</b>	<b>\$ 13,713</b>	<b>\$3,022,234</b>	<b>\$ 66,363</b>	<b>\$ 322,993</b>	<b>\$ 189,066</b>	<b>\$ -</b>	<b>\$ 189,066</b>	<b>\$3,600,656</b>
<b>CHANGE IN NET ASSETS</b>	<b>\$ 101,246</b>	<b>\$ (13,413)</b>	<b>\$ 87,833</b>	<b>\$ (66,363)</b>	<b>\$ (186,866)</b>	<b>\$ (25,318)</b>	<b>\$ -</b>	<b>\$ (25,318)</b>	<b>\$ (190,714)</b>
<b>NET ASSETS AT BEGINNING OF YEAR</b>	<b>1,592,928</b>	<b>33,701</b>	<b>1,626,629</b>	<b>801,332</b>	<b>(110,401)</b>	<b>8,015</b>	<b>-</b>	<b>-</b>	<b>2,325,575</b>
<b>TRANSFERS AMONG FUNDS</b>	<b>(214,460)</b>	<b>13,183</b>	<b>(201,277)</b>	<b>208,208</b>	<b>212,894</b>	<b>56,320</b>	<b>-</b>	<b>56,320</b>	<b>67,937</b>
<b>NET ASSETS AT END OF YEAR</b>	<b>\$1,479,714</b>	<b>\$ 33,471</b>	<b>\$1,513,185</b>	<b>\$ 739,655</b>	<b>\$ (89,059)</b>	<b>\$ 39,017</b>	<b>\$ -</b>	<b>\$ 39,017</b>	<b>\$2,202,798</b>

THE DIOCESE OF OHIO  
DETAILS OF CHANGES IN NET ASSETS - SPECIAL PURPOSE  
Year Ended December 31, 2009

	EDUCATION FUNDS					CAPITAL LOAN AND GRANT FUNDS					OTHER				
	Unrestricted	Designated	Total	Unrestricted	Designated	Total	Unrestricted	Designated	Total	Unrestricted	Designated	Total	Unrestricted	Designated	Total
<b>REVENUE AND SUPPORT</b>															
Joint Investment Fund income	\$ 16,560	\$ 3,683	\$ 20,243	\$ 133,009	\$ 173,632	\$ 306,641	\$ -	\$ -	\$ 128,649	\$ 128,649	\$ 276,925	\$ 306,515	\$ 58,383	\$ -	\$ 364,898
Net realized and unrealized losses on investments	56,949	-	56,949	-	56,949	56,949	1,296	275,195	276,491	381,024	305,894	486,918	8,199	59,688	896,649
Interest and dividend income	-	4,814	4,814	-	4,814	4,814	6,046	-	6,046	100,707	937	101,644	27,256	-	128,894
Other income	-	-	-	-	-	-	-	-	-	51,372	51,372	51,372	158,087	410,142	619,601
Contributions and offerings	-	-	-	-	-	-	-	-	-	13,861	7,913	21,774	461,681	-	483,455
Net assets released from restrictions	128,101	(5,000)	123,101	(123,101)	-	-	298,299	(298,299)	-	541,078	(82,087)	458,991	(458,991)	-	-
Total revenue and support	201,410	3,497	204,907	29,908	234,815	324,723	572,198	7,342	579,540	400,890	1,364,967	1,426,314	255,509	469,830	2,796,198
<b>EXPENSES</b>															
Specialized ministries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technical support and services	383	-	383	129,036	-	129,036	-	-	-	108,252	-	108,252	-	-	237,271
Capital grants	-	-	-	16,647	-	16,647	-	-	-	-	-	-	-	-	16,647
Educational scholarships and grants	101,967	-	101,967	101,967	-	101,967	-	-	-	53,171	-	53,171	-	-	155,138
Other grants	-	-	-	-	-	-	-	-	-	483,239	-	483,239	-	-	483,239
Special assistance to clergy	-	-	-	-	-	-	-	-	-	11,343	-	11,343	-	-	11,343
Depreciation	-	-	-	-	-	-	-	-	-	181,697	-	181,697	-	-	181,697
Other	24,200	-	24,200	17,700	-	17,700	-	-	-	399,519	-	399,519	-	-	241,419
Total expenses	\$ 126,590	\$ -	\$ 126,590	\$ 363,383	\$ -	\$ 363,383	\$ -	\$ -	\$ -	\$ 1,037,221	\$ -	\$ 1,037,221	\$ -	\$ -	\$ 1,327,154
CHANGE IN NET ASSETS	\$ 74,850	\$ 3,497	\$ 78,347	\$ 29,908	\$ 101,500	\$ 130,847	\$ 408,815	\$ 7,342	\$ 415,857	\$ 246,507	\$ 327,746	\$ 389,093	\$ 255,509	\$ 469,830	\$ 1,469,044
NET ASSETS AT BEGINNING OF YEAR	92,794	50,899	143,693	218,483	365,086	583,569	(306,118)	19,103	(287,015)	1,515,347	5,356,551	5,977,389	2,656,786	13,752	8,590,118
NET ASSETS BEFORE OTHER ADJUSTMENTS	\$ 167,654	\$ 54,396	\$ 222,050	\$ 248,391	\$ 470,351	\$ 713,916	\$ 102,297	\$ 26,447	\$ 128,744	\$ 1,761,854	\$ 5,684,297	\$ 6,366,673	\$ 2,912,295	\$ 485,582	\$ 9,694,556
OWNERSHIP ALLOCATION ADJUSTMENT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TRANSFERS AMONG FUNDS	-	-	-	-	-	-	-	-	-	(70,537)	-	(70,537)	3,200	-	(67,337)
NET ASSETS AT END OF YEAR	\$ 167,654	\$ 54,396	\$ 222,050	\$ 248,391	\$ 470,351	\$ 713,916	\$ 102,297	\$ 26,447	\$ 128,744	\$ 1,691,317	\$ 5,613,760	\$ 6,296,136	\$ 2,915,495	\$ 485,582	\$ 9,627,213

THE DIOCESE OF OHIO  
DETAILS OF CHANGES IN NET ASSETS - ENDOWMENT FUNDS

Year Ended December 31, 2009

	Beginning Net Assets	Additions/ Reductions & Appreciation on Funds Held in Trust	Unrealized/ Realized Losses & Depreciation on Funds Held in Trust	Ending Net Assets
Cedar Hills				
Temporarily restricted	\$ 190,700	\$ 66,302	\$ -	\$ 257,002
Permanently restricted	150,425	-	-	150,425
Total	\$ 341,125	\$ 66,302	\$ -	\$ 407,427
Missionary				
Board designated - unrestricted	\$ 88,498	\$ 21,259	\$ -	\$ 109,757
Temporarily restricted	500,862	153,944	-	654,806
Permanently restricted	295,287	-	-	295,287
Total	\$ 884,647	\$ 175,203	\$ -	\$ 1,059,850
Diocese of Ohio - Education				
Board designated - unrestricted	\$ 62,245	\$ 12,098	\$ -	\$ 74,343
Temporarily restricted	889,054	504,455	-	1,393,509
Permanently restricted	1,783,616	10,723	-	1,794,339
Total	\$ 2,734,915	\$ 527,276	\$ -	\$ 3,262,191
Diocesan (Episcopate)				
Board designated - unrestricted	\$ 240,781	\$ 95,228	\$ -	\$ 336,009
Temporarily restricted	1,564,400	469,987	-	2,034,387
Permanently restricted	1,102,871	-	-	1,102,871
Total	\$ 2,908,052	\$ 565,215	\$ -	\$ 3,473,267
ECSF, Church Home, Holy Cross				
Board designated - unrestricted	\$ 3,183,006	\$ 619,855	\$ -	\$ 3,802,861
Temporarily restricted	34,272	84,311	-	118,583
Permanently restricted	1,381,196	150,856	-	1,532,052
Total	\$ 4,598,474	\$ 855,022	\$ -	\$ 5,453,496
Custodial				
Board designated - unrestricted	\$ 2,231,749	\$ 687,661	\$ (92,558)	\$ 2,826,852
Temporarily restricted	1,448,385	475,897	(96,100)	1,828,182
Permanently restricted	1,760,397	88,604	-	1,849,001
Total	\$ 5,440,531	\$ 1,252,162	\$ (188,658)	\$ 6,504,035
Legacy Endowments				
Board designated - unrestricted	\$ (581,162)	\$ 405,374	\$ (51,621)	\$ (227,409)
Temporarily restricted	96,853	14,869	(50,735)	60,987
Permanently restricted	1,911,871	10,773	-	1,922,644
Total	\$ 1,427,562	\$ 431,016	\$ (102,356)	\$ 1,756,222
Total	\$ 18,335,306	\$ 3,872,196	\$ (291,014)	\$ 21,916,488

**JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO**

**FINANCIAL REPORT**

**DECEMBER 31, 2009 and 2008**

**JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO**

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**CRUM,  
BUCHANAN &  
ASSOCIATES**  
*Certified Public Accountants*

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Board of Trustees  
Joint Investment Fund of the Trustees  
of the Diocese of Ohio  
Cleveland, Ohio

Independent Auditors' Report

We have audited the accompanying statements of participant assets and liabilities of the Joint Investment Fund of the Trustees of the Diocese of Ohio as of December 31, 2009 and the related statements of participant activities and cash flows for the year then ended. These financial statements are the responsibility of the Diocese's management. Our responsibility is to express an opinion on these financial statements based on our audit. The financial statements of the Joint Investment Fund of the Trustees of the Diocese of Ohio for the year ended December 31, 2008 were audited by other auditors whose report dated September 10, 2009 expressed an unqualified opinion on those statements.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit also includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Joint Investment Fund of the Trustees of the Diocese of Ohio as of December 31, 2009 and the changes in its participant deposits and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

July 28, 2010

*Crum, Buchanan & Associates*

Crum, Buchanan & Associates

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
STATEMENT OF PARTICIPANT ASSETS AND LIABILITIES  
DECEMBER 31, 2009

	Balanced Fund	Money Market Investment Fund	Total
<b>Participant Assets</b>			
Cash	\$ 12,365	\$ 15,072	\$ 27,437
Investment securities at market value (cost of \$28,563,643 and \$1,176,122, respectively)	32,326,227	1,176,122	33,502,349
Due from Balanced Fund	-	7,254	7,254
Interest and dividends receivable	43,455	-	43,455
<b>Total Participant Assets</b>	<u>\$ 32,382,047</u>	<u>\$ 1,198,448</u>	<u>\$ 33,580,495</u>
<b>Participant Liabilities</b>			
Accounts payable	12,808	-	12,808
Due to Money Market Fund	7,254	-	7,254
Participations to be repaid	143,711	5,548	149,259
Income distributions due participants	78,708	-	78,708
Participant Deposits	32,139,566	1,192,900	33,332,466
<b>Total Participant Liabilities</b>	<u>\$ 32,382,047</u>	<u>\$ 1,198,448</u>	<u>\$ 33,580,495</u>
 <b>Participants' Shares Outstanding (\$10.00 and \$1.00 par value, respectively)</b>	 <u>496,354.0416</u>	 <u>1,192,900.1110</u>	
 <b>Deposit Value Per Share</b>	 <u>\$ 64.75129304</u>	 <u>\$ 1.00000000</u>	

The accompanying notes are an integral part of these financial statements.

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
STATEMENT OF PARTICIPANT ASSETS AND LIABILITIES  
DECEMBER 31, 2008

	<u>Balanced Fund</u>	<u>Money Market Investment Fund</u>	<u>Total</u>
<b>Participant Assets</b>			
Cash	\$ 19,307	\$ 17,397	\$ 36,704
Investment securities at market value (cost of \$28,142,349 and \$1,633,317, respectively)	26,680,244	1,633,317	28,313,561
Due from Balanced Fund	-	7,156	7,156
Interest and dividends receivable	0	138	138
<b>Total Participant Assets</b>	<u>\$ 26,699,551</u>	<u>\$ 1,658,008</u>	<u>\$ 28,357,559</u>
<b>Participant Liabilities</b>			
Accounts payable	6,848	-	6,848
Due to Money Market Fund	7,156	-	7,156
Participations to be repaid	152,732	5,730	158,462
Income distributions due participants	75,793	-	75,793
Participant Deposits	26,457,022	1,652,278	28,109,300
<b>Total Participant Liabilities</b>	<u>\$ 26,699,551</u>	<u>\$ 1,658,008</u>	<u>\$ 28,357,559</u>
 <b>Participants' Shares Outstanding (\$10.00 and \$1.00 par value, respectively)</b>	 <u>487,996.8272</u>	 <u>1,652,278.2710</u>	
 <b>Deposit Value Per Share</b>	 <u>\$ 54.21556151</u>	 <u>\$ 1.00000000</u>	

The accompanying notes are an integral part of these financial statements.

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
STATEMENT OF PARTICIPANT ACTIVITIES  
Year Ended December 31, 2009

	Balanced Fund	Money Market Investment Fund	Total
<b>Investment Income</b>			
Income:			
Bond interest	\$ -		\$ -
Money market interest	145	\$ 1,060	1,205
Dividends	1,331,749		1,331,749
	<u>\$ 1,331,894</u>	<u>\$ 1,060</u>	<u>\$ 1,332,954</u>
Operating expenses	(186,974)	(586)	(187,560)
<b>Net Investment Income</b>	<u>\$ 1,144,920</u>	<u>\$ 474</u>	<u>\$ 1,145,394</u>
<b>Net Realized Gain on Investments</b>	413,799	0	413,799
<b>Net Unrealized Appreciation on Investments</b>	<u>5,194,809</u>	<u>0</u>	<u>5,194,809</u>
<b>Increase in Participant Deposits</b>	\$ 6,753,528	\$ 474	\$ 6,754,002
Income distributions to participants	(1,571,180)	(474)	(1,571,654)
Participations issued	1,237,646	147,746	1,385,392
Participations repaid	<u>(737,450)</u>	<u>(607,124)</u>	<u>(1,344,574)</u>
<b>Change in Participant Deposits</b>	\$ 5,682,544	\$ (459,378)	\$ 5,223,166
<b>Participant Deposits- Beginning of Year</b>	<u>26,457,022</u>	<u>1,652,278</u>	<u>28,109,300</u>
<b>Participant Deposits - End of Year</b>	<u><u>\$ 32,139,566</u></u>	<u><u>\$ 1,192,900</u></u>	<u><u>\$ 33,332,466</u></u>
Participant deposits consist of:			
Participations (par value and premiums)	\$ 5,564,386	\$ 1,192,900	\$ 6,757,286
Cumulative realized gain on investments	22,842,475	-	22,842,475
Cumulative unrealized depreciation on investments	<u>3,732,705</u>	<u>-</u>	<u>3,732,705</u>
	<u><u>\$ 32,139,566</u></u>	<u><u>\$ 1,192,900</u></u>	<u><u>\$ 33,332,466</u></u>

The accompanying notes are an integral part of these financial statements.

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
STATEMENT OF PARTICIPANT ACTIVITIES  
Year Ended December 31, 2008

	<u>Balanced Fund</u>	<u>Money Market Investment Fund</u>	<u>Total</u>
<b>Investment Income</b>			
Income:			
Bond interest	\$ 414,590		\$ 414,590
Money market interest	34,962	\$ 28,617	63,579
Dividends	1,237,417		1,237,417
	<u>\$ 1,686,969</u>	<u>\$ 28,617</u>	<u>\$ 1,715,586</u>
Operating expenses	(285,680)	(115)	(285,795)
<b>Net Investment Income</b>	<u>\$ 1,401,289</u>	<u>\$ 28,502</u>	<u>\$ 1,429,791</u>
<b>Net Realized Gain on Investments</b>	(3,603,374)	0	(3,603,374)
<b>Net Unrealized Depreciation on Investments</b>	<u>(5,134,418)</u>	<u>0</u>	<u>(5,134,418)</u>
<b>Increase in Participant Deposits</b>	\$ (7,336,503)	\$ 28,502	\$ (7,308,001)
Income distributions to participants	(1,545,850)	(28,502)	(1,574,352)
Participations issued	977,977	185,277	1,163,254
Participations repaid	<u>(813,799)</u>	<u>(126,361)</u>	<u>(940,160)</u>
<b>Change in Participant Deposits</b>	\$ (8,718,175)	\$ 58,916	\$ (8,659,259)
<b>Participant Deposits- Beginning of Year</b>	<u>35,175,197</u>	<u>1,593,362</u>	<u>36,768,559</u>
<b>Participant Deposits - End of Year</b>	<u><u>\$ 26,457,022</u></u>	<u><u>\$ 1,652,278</u></u>	<u><u>\$ 28,109,300</u></u>
Participant deposits consist of:			
Participations (par value and premiums)	\$ 5,490,450	\$ 1,652,278	\$ 7,142,728
Cumulative realized gain on investments	22,428,677	-	22,428,677
Cumulative unrealized depreciation on investments	<u>(1,462,105)</u>	<u>-</u>	<u>(1,462,105)</u>
	<u><u>\$ 26,457,022</u></u>	<u><u>\$ 1,652,278</u></u>	<u><u>\$ 28,109,300</u></u>

The accompanying notes are an integral part of these statements.

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
STATEMENTS OF CASH FLOWS  
Years Ended December 31, 2009 and 2008

	2009	2008
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Increase (decrease) in participant deposits resulting from operations	\$ 6,754,002	\$ (7,308,001)
Adjustments to reconcile increase (decrease) in participant deposits resulting from operations to cash provided by operating activities:		
Net realized loss (gain) on investments	(413,799)	3,603,374
Net unrealized appreciation (depreciation) on investments	(5,194,809)	5,134,418
Changes in operating assets and liabilities:		
Interest and dividends receivable	(43,317)	188,580
Accounts payable	5,960	(10,094)
Participations to be repaid	(9,203)	(350)
Income distributions due participants	2,915	(11,114)
Total adjustments	<u>\$ (5,652,253)</u>	<u>\$ 8,904,814</u>
Net cash provided by operating activities	<u>\$ 1,101,749</u>	<u>\$ 1,596,813</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Proceeds from sale of investments	\$ 7,730,052	\$ 31,909,026
Purchase of investments	<u>(7,310,232)</u>	<u>(32,184,549)</u>
Net cash provided by (used in ) investing activities	<u>\$ 419,820</u>	<u>\$ (275,523)</u>
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>		
Distributions to participants	\$ (1,571,654)	\$ (1,574,352)
Participations issued	1,385,392	1,163,254
Participations repaid	<u>(1,344,574)</u>	<u>(940,160)</u>
Net cash used in by financing activities	<u>\$ (1,530,836)</u>	<u>\$ (1,351,258)</u>
<b>DECREASE IN CASH</b>	<u>\$ (9,267)</u>	<u>\$ (29,968)</u>
<b>CASH – BEGINNING OF YEAR</b>	<u>36,704</u>	<u>66,672</u>
<b>CASH – END OF YEAR</b>	<u><u>\$ 27,437</u></u>	<u><u>\$ 36,704</u></u>

The accompanying notes are an integral part of these financial statements.

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2009

**A. Purpose**

The Joint Investment Fund of the Trustees of the Diocese of Ohio (Fund) is an investment fund administered by the Trustees of the Diocese of Ohio for the invested funds of the Diocese of Ohio (Episcopal), existing parishes, parish organizations and any not-for-profit organization subject to the jurisdiction of the Diocese of Ohio.

**B. Use of Estimates**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the report amounts of assets and liabilities and disclosure of contingent assets and liabilities as the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

**C. Investments**

Marketable securities are stated at market value, which is based on quoted market prices or dealer quotes.

Investments are accounted for in accordance with SFAS No. 124, *Accounting for Certain Investments Held by Not-for-Profit Organizations*. This statement requires that covered investments be reported in the statements of participant assets and liabilities at fair value with any realized or unrealized gains and losses reported in the statements of participant activities. Investment income is recognized as revenue in the period it is earned and gains and losses are recognized as changes in participant deposits in the accounting periods in which they occur.

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**C. Investments (Continued)**

At December 31, the Balanced Fund investments are comprised of the following:

	2009		2008	
	Market Value	Cost	Market Value	Cost
Cash and Cash Equivalents	\$ 1,074,121	\$ 1,074,121	\$ 527,526	\$ 527,526
Mutual Funds	18,477,629	16,156,873	14,680,694	15,035,739
Fixed Income	-	-	4,450	4,331
Common Stocks	12,774,477	11,332,649	11,467,574	12,574,753
	<u>\$ 32,326,227</u>	<u>\$ 28,563,643</u>	<u>\$ 26,680,244</u>	<u>\$ 28,142,349</u>

At December 31, the Money Market Fund investments are comprised of the following:

	2009		2008	
	Market Value	Cost	Market Value	Cost
Cash and Cash Equivalents	\$ 1,176,122	\$ 1,176,122	\$ 1,633,317	\$ 1,633,317

All cash and cash equivalents held in the Balanced Fund at December 31, 2009 and 2008 are amounts held in money market funds by investment managers in actively managed funds. These funds have an initial maturity of 3 months or less at the time of purchase and are shown as investments on both the Statements of Participant Assets and Liabilities and the Statements of Cash Flows. The amounts shown on these statements as cash and cash equivalents represent amounts received from participants to purchase units in either the Balanced Fund or Money Market Fund. These amounts are deposited in a checking account at U.S. Bank upon receipt. All cash and cash equivalents held by the Money Market Fund are held in a U.S. Treasury money market fund and are shown as investments on both the Statements of Participants Assets and Liabilities and the Statements of Cash Flows.

**D. Concentration of Credit Risk**

Financial instruments which potentially subject the Fund to concentrations of credit risk consist principally of temporary cash investments and marketable securities. The Fund places its investments with high credit quality institutions. These cash balances, as reflected in the financial institutions' records, are insured by the Federal Deposit Insurance Corporation up to \$250,000.



JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**E. Income Distribution**

Net investment income of the Money Market Fund is distributed monthly to participants based on the earnings of the investments.

Net investment income of the Balanced Fund is distributed at a rate specified for the year, calculated as 4.5% of the rolling average of the value of the Fund on June 30th for the previous three years. Differences between the actual income earnings and the 4.5% are included in the market value change.

**F. Federal Income Taxes**

The Fund is considered tax exempt as a subordinated unit of the Episcopal Church which has been granted a group exemption under Section 501(c) (3) of the Internal Revenue Code.

**G. Fair Value Measurements**

As of January 1, 2008, the Fund adopted the provisions of Statement of Financial Accounting Standards No. 157 (SFAS 157). Fair Value Measurements, for fair value measurement of financial assets and liabilities and for fair value measurements of non-financial items that are recognized and disclosed at fair value in the financial statements on a recurring basis. SFAS 157 defines fair value 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.

The assets that are recorded at fair value on a recurring basis are cash and investments noted on the accompanying Statements of Assets, Liabilities and Net Assets. The Fund has no financial liabilities or non-financial items that are recorded at fair value on a recurring basis.

SFAS 157 establishes a three-level fair value hierarchy that describes the inputs that are used to measure the fair value of respective assets and liabilities:

Level 1: fair values are based on quoted prices in active markets for identical assets and liabilities. The Fund's level 1 assets include all cash and all investments.

Level 2: fair values are based on observable inputs that include: quoted market prices for similar assets or liabilities; quoted market prices that are not in an active market; or other inputs that are observable in the market and can be corroborated. The fund does not currently hold any Level 2 assets.

JOINT INVESTMENT FUNDS OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

**G. Fair Value Measurements (Continued):**

Level 3: fair values are calculated by the use of pricing models and/or discounted cash flow methodologies, and may require significant management judgment or estimation. These methodologies may result in a significant portion of the fair value derived from unobservable data. The Fund does not currently hold any Level 3 assets.

CRUM,  
BUCHANAN &  
ASSOCIATES  
*Certified Public Accountants*

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Board of Trustees  
Joint Investment Fund of the Trustees  
of the Diocese of Ohio  
Cleveland, Ohio

Our audit was made for the purpose of forming an opinion on the basic financial statements taken as a whole. The supplementary information on pages 12-35 for the year ended December 31, 2009 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated in all material respects in relation to the basic financial statements taken as a whole.

July 28, 2010

*Crum, Buchanan & Associates*

Crum, Buchanan & Associates

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PORTFOLIO OF INVESTMENTS  
DECEMBER 31, 2009

	Number of Shares or Par Value	Market Value	Adjusted Cost
<b>BALANCED FUND</b>			
<b>Mutual Fund Investments:</b>			
PIMCO Total Return Fund-Fixed Income	642,074.956	\$ 6,910,931	\$ 6,674,350
PIMCO Diversified Income Instl.-Fixed Income	102,020.665	1,076,343	911,272
PIMCO All Asset fund Institutional	172,752.457	1,984,926	2,090,528
Cohen & Steers Institutional Global Realty	69,596.395	1,288,229	935,523
Columbia Acorn USA Fund CI Z-Small Growth	100,309.011	2,326,166	1,755,272
Dodge & Cox International Stock Fund	83,829.594	2,669,973	1,923,354
Artio International Equity Fund II	188,545.104	2,221,061	1,866,574
<b>Total Mutual Fund Investments</b>		<u>\$ 18,477,629</u>	<u>\$ 16,156,873</u>
<b>World Asset Management S&amp;P 500 Index Fund:</b>			
<b>Domestic Stocks:</b>			
Aflac Inc.	447	\$ 20,674	\$ 21,693
A ES Corp.	816	10,861	6,357
A K Steel Hldg Corp.	136	2,904	1,897
AT&T Inc.	5,977	167,535	165,918
Abbott Labs	1,566	84,548	87,772
Abercrombie & Fitch CO Cl A	105	3,659	2,795
Adobe Systems Inc.	502	18,464	18,649
Advanced Micro Devices Inc.	688	6,660	2,621
Aetna Inc.	439	13,916	10,747
Affiliated Computer Services Inc.Cl A	118	7,043	5,113
Agilent Technologies Inc.	424	13,174	10,452
Air Products Chemicals Inc.	214	17,347	13,067
Airgas Inc.	100	4,760	4,592
Akamai Technologies Inc.	213	5,397	3,176
Alcoa Inc.	986	15,894	11,333
Allegheny Energy Inc.	204	4,790	6,147
Allegheny Technologies Inc.	121	5,417	3,423
Allergan Inc.	311	19,596	12,631
Allstate Corp.	543	16,312	16,024
Altera Corp.	365	8,260	6,406
Amazon Com Inc.	337	45,333	29,768
Ameren Corp.	286	7,994	9,355
American Electric Power Co. Inc.	483	16,804	15,351
American Express Co	1,204	48,786	36,043
American Intl Group Inc.	163	4,887	7,889
American Tower Corp.	406	17,543	13,142
Ameriprise Finl. Inc.	314	12,189	16,977
Amerisourcebergen Corp.	373	9,724	5,845
Amgen Inc.	1,025	57,984	61,705
Amphenol Corp. Cl A	214	9,883	6,388
Anadarko Pete. Corp.	469	29,275	16,882
Analog Devices Inc.	359	11,337	7,990
Aon corp.	342	13,112	14,610
Apache Corp.	321	33,118	26,607
Apartment Invt & Mgmt Co. Cl A	142	2,261	2,148
Apollo Group Inc.	156	9,450	10,939
Apple Inc.	912	192,188	119,220
Applied Matls Inc.	1,350	18,819	17,917
Archer Daniels Midland Co	613	19,193	14,946
Assurant Inc.	143	4,216	3,828
Autodesk Inc.	282	7,166	6,328

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PORTFOLIO OF INVESTMENTS  
DECEMBER 31, 2009

BALANCED FUND	Number of Shares or Par Value	Market Value	Adjusted Cost
<b>World Asset Management: (continued)</b>			
Automatic Data Processing Inc.	480	20,554	17,404
Autonation Inc.	115	2,202	803
Autozone Inc.	39	6,165	4,792
Avanlonbay Cmnty Inc.	98	8,047	6,957
Avery Dennison Corp.	139	5,072	4,880
Avon Products Inc.	432	13,608	11,366
B B & T Corp.	696	17,658	23,441
BJ Services Company	356	6,622	4,792
B M C Software Inc.	230	9,223	6,265
Baker Hughes Inc.	313	12,670	11,583
Ball Corp.	117	6,049	4,322
Bank of America Corp.	10,065	151,579	246,614
Bank of New York Mellon Corp.	1,150	32,166	42,321
Bard R R Inc.	120	9,348	10,552
Baxter Intl. Inc.	576	33,800	35,441
Becton Dickinson & Co.	240	18,926	16,473
Bed Bath & Beyond Inc.	316	12,201	7,849
Bemis Company Inc.	132	3,914	3,376
Best Buy Company Inc.	345	13,614	9,531
Big Lots Inc.	99	2,869	2,460
Biogen Idec Inc.	292	15,622	13,793
Black & Decker Corp.	72	4,668	5,770
Block H & R Inc.	417	9,433	8,601
Boeing Co.	694	37,566	37,219
Boston Ppty Inc.	171	11,469	11,727
Boston Scientific Corp.	1,529	13,761	13,632
Bristol-Myers Squibb Co	1,733	43,758	37,455
Broadcom Corp Cl A	436	13,721	7,717
Brown Forman Corp Cl B	136	7,285	6,477
Burlington Northern Santa Fe Corp	250	24,655	22,902
C H Robinson Worldwide Inc.	209	12,275	11,617
C M S Energy Corp.	273	4,275	2,858
C O N S O L Energy Inc.	222	11,056	7,890
C S X Corp.	374	18,135	17,373
CVS/Caremark Corp.	1,380	44,450	43,675
Ca Inc.	487	10,938	8,792
Cabot Oil & Gas Corp Cl A	125	5,449	3,558
Cameron Intl Corp.	264	11,035	7,228
Campbell Soup Co	236	7,977	9,197
Capital One Finl Corp.	455	17,445	17,956
Cardinal Health Inc.	443	14,282	17,544
Carefusion Corporation	221	5,527	6,936
Caterpillar Inc.	594	33,852	36,930
Cb Richard Ellis Group Inc. Cl A	292	3,962	1,910
CBS Corp. Class B Non Voting	825	11,591	8,126
Celgene Corp.	438	24,388	27,983
Centerpoint Energy Inc.	474	6,878	5,555
Century Tel Inc.	365	13,217	13,418
Cephalon Inc.	91	5,680	6,925
Cf Industries Holdings Inc.	60	5,447	3,894
Chesapeake Energy Corp.	656	16,977	15,088
Chevron Corporation	2,032	156,444	86,873
Chubb Corp.	345	16,967	17,833
Cigna Corp.	333	11,745	12,535
Cincinnati Finl Corp	197	5,169	5,410
Cintas Corp.	160	4,171	3,960

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PORTFOLIO OF INVESTMENTS  
DECEMBER 31, 2009

BALANCED FUND	Number of Shares or Par Value	Market Value	Adjusted Cost
World Asset Management: (continued)			
Cisco Sys Inc.	5,827	139,498	112,561
Citigroup Inc.	19,752	65,379	127,925
Citrix Sys Inc.	221	9,196	5,994
Cliffs Natural Resources Inc.	132	6,084	5,805
Clorox Co.	171	10,431	9,276
Cme Group Inc.	63	21,165	28,969
Coach Inc.	323	11,799	6,512
Coca Cola Co.	2,347	133,779	111,892
Coca Cola Enterprises Inc.	384	8,141	3,982
Cognizant Tech Solutions Crp.	298	13,508	6,292
Colgate Palmolive Co	476	39,103	29,894
Comcast Corp Cl A	2,891	48,742	51,047
Comerica Inc.	182	5,382	10,521
Computer Sciences Corp.	187	10,758	8,887
Compuware Corp	309	2,234	1,953
Conagra Foods Inc.	549	12,654	9,844
Conocophillips	1,502	76,707	88,905
Consolidated Edison Inc.	284	12,902	12,599
Constellation Brands Inc. A	235	3,744	3,121
Constellations Energy Group Inc.	247	8,687	20,011
Corning Inc.	1,486	28,695	36,827
Costco Whsl Corp.	415	24,556	22,779
Coventry Health Care Inc.	179	4,348	2,574
Cummins Inc.	245	11,236	7,076
D R Horton Inc.	334	3,631	2,298
D T E Energy Co	202	8,805	7,666
Danaher Corp.	263	19,778	16,346
Darden Restaurants Inc.	170	5,962	3,893
Davita Inc.	126	7,401	6,683
De Vry Inc. Del	75	4,255	3,473
Dean Foods Company	218	3,933	3,992
Deere & Co.	404	21,852	17,171
Deff Inc.	1,645	23,622	21,204
Denbury Resources Inc.	307	4,544	4,666
Dentsply Intl Inc. New	183	6,436	5,188
Devon Energy Corporation	424	31,164	16,040
Diamond Offshore Drilling Inc.	85	8,366	5,377
Directv Cl A	976	32,550	25,861
Discover Finl Services	658	9,679	8,505
Disney Walt Co	1,889	60,920	49,678
Dominion Resources Inc.	569	22,145	20,813
Donnelley R R & Sons Co	254	5,657	4,343
Dover Corp.	227	9,445	7,452
Dow Chemical Co.	1,093	30,200	27,835
Dr Pepper Snapple Group	307	8,688	7,159
Du Pont E I DE Nemours & Co.	864	29,091	28,613
Duke Energy Corp.	1,240	21,340	20,880
Dun & Bradstreet Corporation	65	5,484	5,070
E Bay Inc.	1,073	25,248	17,216
E M C Corp Mass	1,933	33,770	22,713
E O G Res Inc.	240	23,352	20,111
E*trade Financial Corp.	1,768	3,112	2,981
Eastman Chemical Co.	92	5,542	3,916
Eastman Kodak Co	349	1,473	3,462
Eaton Corp.	201	12,788	9,952
Ecolab Inc.	291	12,973	13,010
Edison Intl	330	11,477	11,919
El Paso Corporation	850	8,355	8,483

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World Asset Management: (continued)	Shares or	Value	Cost
	Par Value		
Electronic Arts Inc.	400	7,100	9,291
Eli Lilly & Co.	966	34,496	55,532
Emerson Elec Co.	718	30,587	25,484
Entergy Corporation	191	15,631	15,676
Equifax Inc.	155	4,788	4,252
Equitable Corp.	158	6,939	4,999
Equity Residential	338	11,418	11,753
Exelon Corporation	630	30,788	50,805
Expedia Inc.	253	6,510	2,398
Expeditors Intl. Wash Inc.	258	8,971	11,103
Express Scripts Inc.	262	22,642	16,282
Exxon Mobil Corp.	4,808	327,858	370,319
FMC Corporation	89	4,963	4,747
Family Dollar Stores Inc.	169	4,703	4,588
Fastenal Co.	156	6,496	6,527
Federal Express Corp.	298	24,868	20,487
Federated Invs Inc.	106	2,915	2,711
Fidelity Natl Information Svcs Inc.	382	8,954	7,633
Fifth Third Bancorp.	977	9,526	10,891
First Energy Corp.	308	14,307	12,884
First Horizon National Corp.	262	3,511	2,941
First Solar Inc.	60	8,124	9,160
Fiserv Inc.	192	9,308	6,847
Flir Systems Inc.	187	6,121	4,435
Flowserve Corp.	69	6,523	4,383
Fluor Corp.	223	10,044	9,514
Fmc Technologies Inc.	152	8,792	6,521
Ford Motor Company	3,349	33,490	11,212
Forrest Labs Inc.	369	11,849	8,612
Fortune Brands Inc.	181	7,819	7,254
FPL Group Inc.	418	22,079	19,840
Franklin Res Inc.	150	15,802	10,928
Freeport-McMoran Copper & Gold Inc.	435	34,926	16,378
Frontier Communications Corp.	383	2,991	3,550
Gamestop Corp Cl A	198	4,344	5,496
Gannett Inc.	276	4,099	3,409
Gap Inc.	591	12,381	7,904
General Dynamics Corp.	368	25,087	17,940
General Elec Co	10,785	163,177	258,589
General Mills Inc.	311	22,022	16,822
Genuine Parts Co	196	7,440	7,824
Genworth Financial Inc Cl A	591	6,708	3,905
Genzyme Corp	268	13,135	19,959
Gilead Sciences Inc.	864	37,385	39,303
Goldman Sachs Group Inc.	520	87,797	53,336
Goodrich Corp.	151	9,702	6,019
Goodyear Tire & Rubber Co.	292	4,117	2,955
Google Inc Cl A	244	151,275	92,869
Grainger W W Inc.	76	7,359	6,153
Halliburton Co.	862	25,938	17,317
Harley Davidson Inc.	285	7,182	6,914
Harman International	85	2,999	1,737
Harris Corp Del	162	7,703	6,112
Hartford Financial Services Group Inc.	472	10,979	34,385
Hasbro Inc.	152	4,873	4,294
Hcp Inc.	360	10,994	10,517
Health Care REIT Inc.	147	6,515	5,436
Hess Corp.	294	17,787	17,827

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World Asset Management: (continued)			
Hewlett Packard Co	2,401	123,676	81,892
Heinz H J Co.	319	13,640	11,791
Home Depot Inc.	1,722	49,817	40,814
Honeywell International Inc.	719	28,185	23,015
Hormel Foods Corp.	86	3,307	2,649
Hospira Inc.	198	10,098	5,714
Host Hotels & Resorts Inc.	747	8,723	7,565
Hudson City Bancorp. Inc.	579	7,950	10,862
Humana Inc.	209	9,173	7,006
Huntington Bancshares Inc.	816	2,978	6,354
I M S Health Inc.	220	4,633	3,324
I T T Corporation	224	11,142	10,354
Illinois Tool Works Inc.	368	17,660	12,773
Integrus Energy Group Inc.	92	3,863	4,498
Intel Corp.	5,593	114,097	91,904
Intercontinentalexchange Inc. Com	91	10,219	8,422
International Business Machines Corp.	1,330	174,097	120,654
International Paper Co.	438	11,730	7,616
Interpublic Group Cos Inc.	578	4,266	3,306
Intl Flavors & Fragrances	95	3,908	3,088
Intuit Inc.	399	12,261	10,185
Intuitive Surgical Inc.	46	13,958	9,335
Iron Mountain Inc.	220	5,007	5,455
J M Smucker Co The New	147	9,077	5,359
J P Morgan Chase & Co.	3,991	166,305	161,008
Jabil Circuit Inc.	226	3,926	2,070
Jacobs Engr Group Inc.	152	5,717	6,360
Janus Capital Group Inc.	223	2,999	2,719
JDS Uniphase Corp.	260	2,145	1,435
Johnson & Johnson	2,794	179,962	161,946
Johnson Controls Inc.	641	17,461	12,904
Juniper Networks Inc.	532	14,188	9,986
Kellogg Co.	257	13,672	13,425
Keycorp New	1,079	5,988	11,153
Kimberly Clark Corp.	396	25,229	25,272
Kimco Realty Corp.	462	6,251	8,587
King Pharmaceuticals Inc.	299	3,669	2,733
K L A - Tencor Corp.	210	7,594	4,996
Kohls	310	16,718	10,912
Kraft Foods Inc. Cl A	1,410	38,324	46,435
Kroger Co.	659	13,529	17,193
L-3 Communications Holdings Inc.	144	12,521	11,943
Laboratory Corp Of America Holdings	134	10,029	8,474
Lauder Estee Cos Inc.	139	6,722	5,121
Legg Mason Inc.	199	6,002	4,471
Leggett & Platt Inc.	195	3,978	3,461
Lennar Corp Cl A	189	2,414	1,850
Leucadia National Corp.	224	5,329	6,199
Lexmark International Inc.	96	2,494	2,641
Life Technologies Corp.	215	11,227	4,903
Limited Brands	333	6,407	4,066
Lincoln National Corp Ind.	365	9,081	18,174
Linear Technology Corp.	268	8,190	6,381
Lockheed Martin Corp.	308	23,208	26,437
Loews Corp.	365	13,268	12,196
Lowes Cos Inc.	1,413	33,050	30,529
Lsi Corporation	781	4,694	3,257
M & T Bank Corp.	101	6,756	8,477



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<b>World Asset Management (continued) :</b>			
M E M C Electric Materials Inc.	274	3,732	6,121
Macy's Inc.	510	8,548	12,105
Marathon Oil Corporation	676	21,105	30,276
Marriott Intl Inc.	309	8,420	6,498
Marsh & McLennan Cos Inc.	640	14,131	18,835
Marshall & Ilsley Corp. New	621	3,384	7,824
Masco Corp.	436	6,021	4,395
Massey Energy Company	102	4,285	2,361
Mastercard Inc.	91	23,294	16,626
Mattel Inc.	437	8,731	6,712
McAfee Inc.	191	7,749	6,337
McCormick & Co Inc.	161	5,817	5,389
McDonalds Corp.	1,093	68,247	43,559
McGraw-Hill Cos Inc.	385	12,901	10,661
McKesson Corporation	271	16,937	10,301
Mead Johnson Nutrition Co A	207	9,046	8,589
Meadwestvaco Corp.	207	5,926	3,088
Medco Health Solutions Inc.	453	28,951	19,371
Medtronic Inc.	1,121	49,302	45,201
Merck And Co Inc. New	3,094	113,055	83,519
Meredith Corp.	43	1,327	903
Metlife Inc.	782	27,644	27,284
Metropes Communications Inc.	312	2,381	4,448
Microchip Technology Inc.	223	6,478	5,640
Micron Technology Inc.	1,046	11,046	5,261
Microsoft Corp.	7,824	238,476	186,964
Millipore Corp.	66	4,775	3,674
Molex Inc.	173	3,728	2,637
Molson Coors Brewing Co Cl B	192	8,671	7,501
Monsanto Co.	522	42,673	24,849
Monster Worldwide Inc.	150	2,610	2,014
Moodys Corp.	239	6,405	6,066
Morgan Stanley	1,299	38,450	27,229
Motorola Inc.	2,195	17,033	11,444
Murphy Oil Corp.	237	12,845	12,613
Mylan, Inc.	369	6,801	3,358
Nasdaq Omx Group, Inc.	164	3,250	5,461
National Oilwell Varco Inc.	399	17,592	13,114
National Semiconductor Corp.	287	4,408	4,111
Netapp Inc.	408	14,019	5,749
New York Times Co.	141	1,743	1,451
Newell Rubbermaid Inc.	336	5,043	7,740
Newmont Mining Corporation	468	22,141	14,220
News Corp Inc. Cl A	2,150	29,433	23,311
Nicor Inc.	54	2,273	2,399
Nike Inc.	371	24,512	16,047
Nisource Inc.	332	5,106	4,492
Noble Energy Inc.	175	12,463	11,440
Nordstrom Inc.	202	7,591	3,554
Norfolk Southern Corp.	351	18,399	17,645
Northeast Utilities	214	5,519	4,372
Northern Trust Corp.	244	12,786	18,486
Northrop Grumman Corp.	317	17,704	15,238
Novell Inc.	418	1,735	2,031
Novellus System Inc	120	2,801	1,930
Nucor Corp.	318	14,835	20,405
Nvidia Corp.	675	12,609	6,068
NYSE Euronext	322	8,147	9,712

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<b>World Asset Management (continued) :</b>			
O Reilly Automotive Inc.	166	6,328	5,870
Occidental Pete Corp.	822	66,870	26,857
Office Depot Inc.	333	2,148	1,059
Omnicom Group Inc.	315	12,332	9,626
Oracle Corporation	3,960	97,139	88,502
Owens Illinois Inc.	207	6,805	4,653
P G & E Corp.	375	16,744	13,745
P N C Financial Services Group Inc.	441	23,280	30,578
P P G Industries Inc.	203	11,884	11,900
P P L Corporation	381	12,310	11,418
Paccar Inc.	368	13,347	11,476
Pactiv Corp.	158	3,814	4,163
Pall Corp.	145	5,249	3,928
Parker Hannifin Corp.	198	10,668	8,122
Patterson Cos Inc.	110	3,078	2,825
Paychex Inc.	396	12,133	11,585
Peabody Energy Corp.	271	12,252	9,526
Penney J C Company Inc.	289	7,690	6,920
Peoples United Financial Inc.	428	7,148	7,619
Pepco Holdings Inc.	266	4,482	5,348
Pepsi Bottling Group Inc.	177	6,637	4,352
Pepsico Inc.	1,580	96,064	92,158
Perkin Elmer Inc.	145	2,986	2,817
Pfizer Inc.	8,174	148,685	197,223
Pinnacle West Capital Corp.	122	4,463	3,949
Pioneer Natural Resources Company	145	6,985	4,237
Pitney Bowes Inc.	252	5,735	10,985
Plum Creek Timber Co. Inc.	201	7,590	7,568
Polo Ralph Lauren Corp.	68	5,507	3,367
Praxair Inc.	293	23,531	13,846
Precision Castparts Corp.	142	15,670	9,771
Priceline Com Inc.	52	11,357	8,727
Principal Financial Group Inc.	392	9,424	12,314
Procter & Gamble Co.	2,959	179,404	175,063
Progress Energy Inc.	342	14,025	13,759
Progressive Corp.	682	12,269	9,800
Prologis	546	7,475	6,094
Prudential Financial Inc.	470	23,387	19,163
Public Storage Inc.	166	13,521	13,783
Public Svc Enterprise Group Inc.	512	17,024	21,820
Pulte Homes Inc.	404	4,040	4,796
Q Logic Corp.	146	2,755	1,831
Qualcomm Inc.	1,691	78,226	79,843
Quanta Services Inc.	243	5,064	5,656
Quest Diagnostics Inc.	191	11,533	9,208
Qwest Communications Intl Inc.	215	8,938	7,396
Radioshack Corporation	1,801	7,582	6,105
Range Resources Corp.	159	3,100	1,968
Raytheon Company	194	9,671	8,001
Red Hat Inc.	372	19,165	18,871
Regions Financial Corp.	232	7,169	5,336
Republic Services Inc.	1,427	7,549	12,950
Robert Half Intl Inc.	397	11,239	8,600
Rockwell Automation Inc.	189	3,052	3,791
Rockwell Collins Inc.	176	8,268	5,257
Roper Industries Inc.	193	10,684	7,477
Ross Stores Inc.	94	4,923	5,005
	126	5,381	5,405

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<b>World Asset Management (continued) :</b>			
Rowan Cos. Inc.	137	3,102	3,050
Ryder Systems Inc.	68	2,800	2,783
Safeway Inc.	511	10,879	11,319
Saie Inc.	310	5,871	5,842
Salesforce Com Inc.	131	9,664	4,174
Sandisk Corp.	273	7,914	2,722
Sara Lee Corp.	857	10,438	14,723
Scana Corporation	135	5,087	4,488
Schwab Charles Corp.	965	18,161	20,050
Scripps Network Interactive Inc.	109	4,523	3,121
Sealed Air Corp.	191	4,175	3,312
Sears Holdings Corp.	61	5,090	3,481
Sempra Energy	249	13,939	11,043
Shering Williams Co.	119	7,336	4,761
Sigma Alrich Corp.	152	7,684	6,886
Simon Property Group Inc.	272	21,717	18,466
Simi Corp	567	6,390	6,413
Smith Intl. Inc.	272	7,390	9,493
Snap On Inc.	69	2,916	2,704
Southern Co.	761	25,356	26,717
Southwest Airlines Co.	915	10,458	10,899
Southwestern Energy Co.	349	16,822	12,936
Spectra Energy Corp.	655	13,434	12,382
Sprint Nextel Corp.	3,560	13,030	14,740
St. Jude Medical Inc.	338	12,432	13,591
Stanley Works	95	4,893	3,557
Staples Inc.	733	18,024	14,276
Starbucks Corp.	752	17,341	9,334
Starwood Hotels & Resorts	226	8,265	5,026
State Street Corp.	472	20,551	30,491
Stericycle Inc.	103	5,682	6,296
Stryker Corp.	286	14,406	15,439
Sun Microsystems Inc.	913	8,555	4,510
Sunoco Inc.	141	3,680	9,202
Suntrust Banks Inc.	613	12,438	31,539
Supervalu Inc.	257	3,266	3,824
Symantec Corp.	821	14,688	11,215
Sysco Corp.	599	16,736	15,334
T J X Companies Inc.	425	15,534	11,330
T Rowe Price Group Inc.	260	13,845	15,641
Target Corporation	719	34,778	29,606
Teco Energy Inc.	258	4,185	3,287
Tellabs Inc. Del	482	2,738	2,029
Tenet Healthcare Corp.	503	2,711	1,318
Teradata Corp. Del	216	6,789	3,599
Teradyne Inc.	204	2,189	1,144
Tesoro Corporation	167	2,263	1,779
Texas Instruments, Inc.	1,206	31,428	23,035
Textron Inc.	332	6,245	5,911
The Hershey Company	201	7,194	7,686
Thermo Fisher Scientific, Inc.	390	18,599	22,404
Tiffany & Co. New	150	6,450	4,011
Time Warner Cable Inc.	356	14,735	11,100
Time Warner Inc.	1,182	34,443	26,919
Titanium Metals Corporation	103	1,290	1,088
Torchmark Corp.	105	4,615	4,762
Total System Services Inc.	239	4,127	3,382
Travelers Cos Inc.	542	27,024	23,082

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<b>World Asset Management (continued) :</b>			
Tyson Foods Inc. Cl A	364	4,466	3,170
U N U M Provident Corp.	409	7,984	7,509
Union Pacific Corp.	482	30,800	33,350
United Health Group Incorporated	1,111	33,863	25,358
United Parcel Service Inc. Cl B	1,005	57,657	55,492
United States Steel Corp.	177	9,756	7,162
United Technologies Corp.	949	65,870	44,533
U S Bancorp	1,828	41,148	56,300
V F Corp.	109	7,983	6,236
Valero Energy Corp.	687	11,507	14,846
Varian Med Sys Inc.	151	7,074	6,818
Ventas Inc.	193	8,442	4,379
Verisign Inc.	234	5,672	5,228
Verizon Communications Inc.	2,877	95,315	95,300
Viacom Inc. Class B	580	17,243	12,685
Visa Inc. Class A Shares	453	39,619	40,301
Vornado Realty Tr	191	13,359	13,295
Vulcan Materials Co	150	7,900	8,590
Wal Mart Stores Inc.	2,161	115,505	120,696
Walgreen Co	949	34,847	24,356
Washington Post Co Cl B	7	3,077	3,152
Waste Management Inc. Del	495	16,736	16,200
Waters Corp.	120	7,435	5,426
Watson Pharmaceuticals Inc.	126	4,991	3,340
Wellpoint Inc.	454	26,464	18,679
Wells Fargo & Co	5,177	139,727	138,997
Western Digital Corp	274	12,097	7,261
Western Union Co	701	13,214	10,950
Weyerhaeuser Co	256	11,044	9,805
Whirlpool Corp.	90	7,259	4,442
Whole Foods Mkt Inc.	170	4,666	1,870
Williams Cos Inc.	590	12,437	12,330
Windstream Corp.	533	5,858	4,738
Wisconsin Energy Corporation	141	7,026	6,019
Wyndham Worldwide Corp.	215	4,337	1,909
X T O Energy Inc.	554	25,778	25,950
Xcel Energy Inc.	564	11,968	10,293
Xerox Corp	1,058	8,951	8,654
Xilinx Inc.	335	8,395	6,013
Yahoo! Inc.	1,140	19,129	15,228
Yum Brands Inc.	473	16,541	14,479
Zimmer Holdings Inc.	215	12,709	9,967
Zions Bancorporation	155	1,989	6,275
3M Co.	717	59,274	47,725
<b>Total Domestic Stocks</b>		<u>\$ 10,003,385</u>	<u>\$ 9,181,292</u>
<b>Foreign Stocks:</b>			
Carnival Corp	442	\$ 14,007	\$ 10,991
Invesco Ltd	508	11,933	8,242
Nabors Industries Ltd	349	7,640	15,374
Schlumberger Ltd	1,216	79,149	48,323
X L Cap Ltd	422	7,735	4,546
<b>Total Foreign Stocks</b>		<u>\$ 120,464</u>	<u>\$ 87,476</u>
<b>Total World Asset Management</b>		<u>\$ 10,123,849</u>	<u>\$ 9,268,768</u>

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<b>Integrity Asset Management Small/Mid Cap Value Fund:</b>			
AK Steel Holding Corp	637	\$ 13,600	\$ 11,590
Actuant Corporation	1,067	19,772	13,167
Adc Telecommunications Inc.	2,100	13,041	13,401
Advanced Energy Inds. Inc	1,410	21,263	12,377
Airgas Inc.	556	26,466	20,208
Albermarle Corp.	673	24,477	14,886
American Financial Group Inc. Ohio	1,290	32,185	26,275
Amerigroup Corp	268	7,225	6,571
Amsurg Corp	660	14,533	11,296
Arch Cap Group Ltd	547	39,138	34,139
Arrow Electrics Inc.	990	29,314	17,241
Ashland Inc.	711	28,170	23,471
Associated Banc Corp	100	1,101	1,113
Atmel Corp	3,140	14,475	13,192
B E Aerospace Inc.	1,250	29,375	11,437
Baldor Electric	660	18,539	17,641
Beazer Homes USA Inc	1,830	8,857	7,636
Benchmark Electrics Inc.	1,412	26,701	16,127
Berry Pete Co Cl A	533	15,537	11,847
Brown Shoe Company Inc.	1,460	14,410	11,614
C E C Entertainment Inc. Com New	701	22,376	15,389
Callaway Golf Co.	1,802	13,587	15,404
Cardinal Financial Corp	1,902	16,623	14,740
Carrizo Oil & Gas Ltd.	681	18,054	12,726
Celanese Corp Series A	1,360	43,656	15,607
Cf Industries Holdings Inc.	181	16,431	9,176
Cincinnati Bell Inc.	4,190	14,456	8,678
Cleco Corporation	836	22,848	18,092
Colonial Properties Trust	1,360	15,953	13,676
Commscope Inc.	576	15,281	6,159
Comstock Resources Inc.	286	11,603	11,346
Comtech Telecommunications Corp	490	17,170	15,608
Consolidated Graphics Inc.	557	19,506	7,177
Continental Airlines Inc.Cl B	1,378	24,694	20,127
Cooper Tire & Rubber Co	786	15,759	7,842
D R Horton Inc.	1,680	18,262	17,434
Dean Foods Company	860	15,514	13,589
Developers Diversified Realty Corp	1,391	12,881	11,404
Diebold Inc.	700	19,915	19,802
Digital Realty Trust Inc.	390	19,609	11,441
Diodes Incorporated	1,390	28,370	10,591
Dycom Industries Inc.	1,868	15,000	10,776
Education Realty Trust Inc.	3,240	15,682	14,814
Encore Acquisition Co	400	19,208	11,105
Entegris Inc.	4,317	22,794	15,187
Entercom Communications Corp	1,420	10,039	1,388
Fairchild Semicon Intl Cl A	1,940	19,381	18,059
Federal Realty Investment Tr SBI New	210	14,221	12,110
Fidelity National Financial Inc.	1,010	13,595	8,306
First Financial Bancorp	1,799	26,193	13,704
Firstmerit Corp	963	19,395	19,841
Foot Locker Inc.	1,774	19,762	13,689
Gannett Inc.	1,619	24,042	18,830
General Cable Corporation	342	10,062	13,053
Genesco Inc.	790	21,693	18,050
Granite Construction Inc.	436	14,676	14,425
Great Lakes Dredge & Dock Corp New	3,169	20,535	20,399
Hancock Holdings Co.	600	26,286	23,991

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PORTFOLIO OF INVESTMENTS  
DECEMBER 31, 2009

BALANCED FUND	Number of Shares or Par Value	Market Value	Adjusted Cost
Integrity Asset Management Small/Mid Cap Value Fund (continued) :			
Hanover Ins Group Inc.	820	36,433	30,956
Harris Stratex Networks Cl A	727	5,024	3,570
Health Care Reit Inc.	570	25,262	22,032
Hexcel Corp New	2,303	29,893	20,024
Highwoods Properties Inc.	850	28,347	25,436
Hornbeck Offshore Services	640	14,899	12,665
Hunt J B Trans Services Inc.	372	12,004	10,369
I B E R I A B A N K Corporation	200	10,762	9,616
Inland Real Estate Corp.	1,632	13,301	12,042
Innophos Holdings	1,135	26,082	16,744
Integrated Device Technology Inc.	4,410	28,533	24,754
Intrepid Potash Inc.	862	25,145	21,327
Investment Technology Group Inc.	695	13,691	13,324
J D A Software Group Inc.	669	17,039	15,942
J M Smucker Co The New	232	14,326	12,659
Jabil Circuit Inc.	1,420	24,665	10,791
Jones Apparel Group Inc.	1,260	20,236	6,720
Kbw Inc.	380	10,397	8,890
Key Energy Services Inc.	3,529	31,020	25,987
Keycorp New	3,450	19,147	19,150
Kinetic Concepts Inc.	532	20,030	18,864
King Pharmaceuticals Inc.	3,360	41,227	31,430
Knight Cap Group Inc.	1,050	16,170	15,248
M D U Res Group Inc.	1,507	35,565	26,863
M G I C Investment Corp	2,467	14,259	18,166
M K S Instruments Inc.	1,085	18,879	15,539
Manitowoc Company Inc.	1,160	11,565	7,523
Mueller Water Products Inc Com Series B	3,734	19,417	13,001
Myers Industries Inc.	1,170	10,647	10,530
National Penn Bancshares Inc.	3,260	18,875	19,209
National Retail Properties Inc.	880	18,674	13,749
Northeast Utilities	1,394	35,951	29,707
Old Dominion Freight Line Inc.	483	14,828	11,904
P N M Resources Inc.	1,663	21,037	20,059
Pacwest Bancorp Del	310	6,246	6,691
Parametric Technology Corp	1,762	28,791	20,113
Perkin Elmer Inc.	1,671	34,406	29,519
Phillips Van Heusen Corp.	270	10,984	5,282
Plexus Corp.	849	24,180	13,985
Post Properties Inc.	732	14,347	13,169
Progress Software Corp.	709	20,717	15,868
Quaker Chem Corp	25	516	515
Radian Group Inc.	2,040	14,912	17,776
Robbins & Myers Inc.	630	14,818	11,402
Rockwood Holdings Inc.	1,353	31,877	13,530
Rri Energy Inc.	2,932	16,771	19,544
Ryland Group Inc.	806	15,878	14,591
Sapient Corp	1,710	14,142	12,808
Schnitzer Stl Inds Inc. Cl A	234	11,162	11,816
Smith A O Corp	230	9,980	6,638
Solutia Inc.	2,297	29,172	6,300
South Financial Group Inc.	2,113	1,363	4,025
Spartech Corp.	1,028	10,547	13,211
Standard Pac Corp New	2,600	9,724	5,811
Starwood Hotels & Resorts	742	27,135	14,853
Steel Dynamics Inc.	1,473	26,102	14,504
Sunstone Hotel Invs. Inc.	3,444	30,583	18,556
Susquehanna Bancshares Inc. Pa.	1,250	7,362	10,887

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PORTFOLIO OF INVESTMENTS  
DECEMBER 31, 2009

	Number of Shares or Par Value	Market Value	Adjusted Cost
<b>BALANCED FUND</b>			
<b>Integrity Asset Management Small/Mid Cap Value Fund (continued) :</b>			
Syniverse Holdings Inc.	420	7,342	3,723
Synovus Financial Corp.	4,044	8,290	8,148
Temple Inland Inc.	1,181	24,931	19,273
Tenneco Inc.	1,014	17,978	12,124
Triumph Group Inc.	270	13,027	12,856
Trustmark Corporation	1,003	22,608	20,004
TRW Automotive Holdings Corp.	546	13,038	12,916
T3 Energy Services Inc.	630	16,065	9,492
U G I Corp.	1,150	27,818	26,531
U Store It Trust	2,360	17,275	13,525
Universal Health Services Inc. Cl B	1,000	30,500	19,136
Vectren Corporation	820	20,238	20,507
Washington Federal Inc.	1,047	20,249	16,574
Washington Real Estate Investment Tr SBI	211	5,813	4,515
Western Alliance Bancorporation	2,973	11,238	17,979
Whiting Petroleum Corp.	280	20,006	11,536
Whitney Holding Corp.	2,860	26,055	28,130
Willbros Group Inc.	1,265	21,341	15,877
Wisconsin Energy Corporation	757	37,721	31,568
World Accep Corp.	1,130	40,488	20,379
Zions Bancorporation	1,580	20,271	43,940
<b>Total Integrity Asset Management</b>		<u>\$ 2,650,628</u>	<u>\$ 2,063,881</u>
<b>Total Common Stocks</b>		<u>\$ 12,774,477</u>	<u>\$ 11,332,649</u>
<b>Short-Term Investments</b>			
Cash in Transit - Alternative Investment Group		\$ 1,000,000	\$ 1,000,000
First American Treasury Obligations Class Y	74,084.34	74,121	74,121
<b>Total Short-Term Investments</b>		<u>\$ 1,074,121</u>	<u>\$ 1,074,121</u>
<b>Total Balanced Fund</b>		<u>\$ 32,326,227</u>	<u>\$ 28,563,643</u>
<b>Money Market Investment Fund</b>			
First American Treasury Obligations Class Y	<u>1,176,122.440</u>	<u>\$ 1,176,122</u>	<u>\$ 1,176,122</u>

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
VALUATION DATA SUMMARY  
YEAR ENDED DECEMBER 31, 2009

BALANCED FUND

Valuation Date	Market Value Per Unit	Net Investment Income Distributed Per Unit
January 31, 2009	\$ 50.93813557	\$ 0.26634570
February 28, 2009	\$ 47.00587389	\$ 0.26634570
March 31, 2009	\$ 49.40322105	\$ 0.26634570
April 30, 2009	\$ 53.24273469	\$ 0.26634570
May 31, 2009	\$ 55.91644375	\$ 0.26634570
June 30, 2009	\$ 55.70671572	\$ 0.26634570
July 31, 2009	\$ 59.27227031	\$ 0.26634570
August 31, 2009	\$ 61.08389697	\$ 0.26634570
September 30, 2009	\$ 63.19049560	\$ 0.26634570
October 31, 2009	\$ 61.55521624	\$ 0.26634570
November 30, 2009	\$ 63.63775930	\$ 0.26634570
December 31, 2009	\$ 64.75129304	\$ 0.26634570
<b>Total</b>		<b>\$ 3.1961484</b>

MONEY MARKET INVESTMENT FUND

Valuation Date	Market Value Per Unit	Net Investment Income Distributed Per Unit
January 31, 2009	\$ 1.000000	\$ 0.0001027
February 28, 2009	\$ 1.000000	\$ 0.0001812
March 31, 2009	\$ 1.000000	\$ 0.0000993
April 30, 2009	\$ 1.000000	\$ 0.0000126
May 31, 2009	\$ 1.000000	\$ 0.0000090
June 30, 2009	\$ 1.000000	\$ 0.0000000
July 31, 2009	\$ 1.000000	\$ (0.0008808)
August 31, 2009	\$ 1.000000	\$ 0.0000000
September 30, 2009	\$ 1.000000	\$ (0.0000796)
October 31, 2009	\$ 1.000000	\$ 0.0000000
November 30, 2009	\$ 1.000000	\$ 0.0000000
December 31, 2009	\$ 1.000000	\$ (0.0001291)
<b>Total</b>		<b>\$ (0.000685)</b>



**JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPANTS IN THE BALANCED FUND  
DECEMBER 31, 2009**

Parish/Mission/Diocese			Number of	Market Value
Parish/Mission Investment:			Units	(Per Unit)
				\$ 64,751,293.04
Akron	Church of Our Savior	Endowment	665.0080	\$ 43,060
		Rowe Fund	61.0380	3,952
Alliance	Trinity Church	Endowment Fund	4,449.0382	288,081
		Choir Fund	195.0869	12,632
		Lilly Lane Fund	7.5912	492
Ashland	St. Matthew's	St. Matthew's Episcopal Church Rectory Fund	495.2271	32,067
Berea	St. Thomas' Church	Romp Fund	5.4147	351
Boardman	St. James' Church	Nesbitt Fund	521.6930	33,780
		M. L. Withers Fund	73.1690	4,738
		Prince Endowment	66.2125	4,287
Canton	St. Mark's Church	Endowment Fund	2,299.0352	148,866
Cleveland	Church of the Transfiguration	Powell Flower Fund	31.8303	2,061
		Endowment	1,248.8132	80,862
	St. John's Church	St. John Fund	652.1182	42,225
		Restoration Fund	453.4979	29,365
	St. Andrew's Church	E. M. Davis Memorial	124.0519	8,033
		J. C. Davis Endowment	33.8350	2,191
	St. Luke's Church	Florence Tilt	844.4325	54,678
	Trinity Cathedral	Leonard Bequest	2,521.0380	163,240
		Root Fund	407.2020	26,367
Cleveland Hts.	St. Paul's Church	Marshall Living Trust	2,458.8472	159,214
Coshocton	Trinity Church	Branson Fund	955.0637	61,842
		Endowment Fund	2,673.6425	173,122
Defiance	Grace Church	Robertson Endowment	2,350.4571	152,195
Elyria	St. Andrew's Church	Reserve Fund	1,989.5136	128,824
Euclid	Church of the Epiphany	Endowment	1,337.9430	86,634
		Capital Drive Fund	100.7444	6,523
		Columbarium Fund	97.4080	6,307
		Capital Drive Fund - Income	64.6568	4,187
Gambier	Harcourt Parish	Ganter /Parish House	91.7364	5,940
		Redhead Estate	3,529.2190	228,521
Geneva	Christ Church	Christ Church Memorial Fund	57.9344	3,751
Lorain	Church of the Redeemer	Endowment Fund	2,428.5366	157,261
		Preservation Fund	235.0101	15,217
		The Alvin and Phyllis Pfaff Fund	254.6081	16,486
		Kniffin Memorial Fund	31.9570	2,069
		Bevan Memorial Fund	22.9320	1,485
Macedonia	St. Timothy's Church	Endowment Fund	276.8398	17,926
Mansfield	Grace Church	Memorial Fund	12,204.1256	790,233
		Gorman Fund	1,530.9760	99,133
Marion	St. Paul's Church	Endowment	210.4255	13,625
Medina	St. Paul's Church	St. Paul Fund	1,186.5673	76,832
		Outreach Fund	241.0675	15,609
		Helen Kindig Thompson Ed. Fund	50.9831	3,301
		Staff Development Fund	32.5532	2,108
		Columbarium Fund	257.1201	16,649
Napoleon	St. John the Evangelist Church	The Searles Endowment	31.9906	2,071
		Dorothy Haquet Fund	5.0470	327
		Lauren Huntley Fund	4.8070	311
		Halvorson Endowment	8.7838	569
Niles	St. Luke's Episcopal Church	Endowment Fund	2,998.2815	194,143
Norwalk	St. Paul's Church	St. Paul Fund	1,473.8354	95,433
Oberlin	Christ Church	Bubb Fund	116.5090	7,544
		Severance Fund	24.1740	1,565
		Nord Fund	4,205.9301	272,339
		Mission Endowment	1,826.3614	118,259
		Christ Church Bequest Fund	371.9974	24,087
		Alexander/Campbell Grounds Beautification Fund	423.4903	27,422

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPANTS IN THE BALANCED FUND  
DECEMBER 31, 2009

Parish/Mission/Diocese			Number of	Market Value
Parish/Mission Investment (continued):			Units	(Per Unit)
				\$ 64,751,293.04
Oberlin	Christ Church	Fowler Library Fund	73.7348	4,774
Oregon	St. Paul's Church	Property Endowment	199.3555	12,909
		S. Paul Church- Endowment Fund	465.5864	30,147
Painesville	St. James' Church Foundation	Endowment	7,308.2278	473,217
Parma	All Saints' Church	Endowment Fund	1,310.8924	84,882
Port Clinton	St. Thomas Church	St. Thomas Port Clinton Fund	542.6176	35,135
Put-In-Bay	St. Paul's Church	General Investment Fund	1,462.9097	94,725
Ravenna	Grace Episcopal Church	Grace Church Endowment	1,261.0363	81,654
		Youth Scholarship Fund	83.3090	5,394
		The Mary Helen Beatty Endowment Fund of Grace Episcopal Church	9,978.9418	646,149
Sandusky	Grace Church	Lay Pension Plan	1,691.1536	109,504
Shaker Heights	Christ Church	White Spire Fund of Christ Episcopal Church	11,994.8505	776,682
Steubenville	St. Stephen's Church	Endowment Fund	1,304.1917	84,448
Toledo	All Saints' Church	Katherine Bowles Fund	16.3852	1,061
		Rectory Fund	37.2398	2,411
		Memorial Fund	16.6528	1,078
Warren	Christ Church	Angstadt Altar	483.0207	31,276
		Baiz Floral Fund	48.3257	3,129
		Outreach Fund	1,179.3055	76,362
		Helen Roemer Garden Fund	658.2759	42,624
		Organ Maintenance Fund	210.8973	13,656
		Bessie Proctor Floral Fund	15.0777	976
Youngstown	St. Augustine	St. Augustine Church Fund	24.2593	1,571
<b>Total Parish/Mission Investment</b>			<b>101,683.6553</b>	<b>\$ 6,584,146</b>
<b>Other Diocesan Organizations:</b>				
	Church Periodical	Mabel M. Higgs	64.2966	\$ 4,163
	Diocese of Southern Ohio	Founders Scholarship	32.6660	2,115
		Holland Memorial Fund	33.1280	2,145
		Kinney Fund	54.6350	3,538
		Swayne Fund	388.5290	25,158
		William A. Leonard	173.4340	11,230
	Episcopal Church Women	Eliza J. Backus Fund	2,257.0536	146,147
		Carlotta East Scholarship	699.9067	45,320
		K. L. Mather Fund	637.1670	41,257
		<b>Subtotal</b>	<b>4,340.8159</b>	<b>\$ 281,073</b>
<b>Diocesan Funds:</b>				
	Episcopate	Bishop Leonard	4,200.9479	\$ 272,017
		Bishop Leonard Residence Fund	891.6677	57,737
		Ellen King	2,000.5303	129,537
		Episcopate-Endowment Fund	32,497.5989	2,104,262
		Gordon A. J. Morris Fund	3,386.7463	219,296
		Hitchcock Estate	2,237.1366	144,857
		Julia Bedell	409.9630	26,546
		Lawrence H. Norton	384.3072	24,884
		Mather Fund (Ring)	4,774.2754	309,141
		<b>Subtotal</b>	<b>50,783.1733</b>	<b>\$ 3,288,277</b>
	Missionary Fund	Ada Butler Abbott	61.7184	\$ 3,997
		Bronson Memorial	111.7095	7,234
		Denholm Estate	108.7263	7,040
		Diocesan Missionary	4188.0644	271,183
		Diocesan Missionary - Income	289.3625	18,737
		Eliza A. Mather	403.3483	26,117
		Eliza A. Moor	80.0653	5,184

**JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPANTS IN THE BALANCED FUND  
DECEMBER 31, 2009**

Parish/Mission/Diocese		Number of	Market Value
		Units	(Per Unit)
Diocesan Funds (Continued) :			\$ 64,751,293.04
	F. Jackson Fund	2503.3770	162,097
	Fanny Chandler	49.9457	3,234
	Frances Upham Jarvis	289.4440	18,742
	Madam Goetz	61.5461	3,985
	Grace Trnka	70.2624	4,550
	Julia Bedell	1639.8530	106,183
	Leonard Bequest	2436.9242	157,794
	Mabel M. Higgs	1295.8420	83,907
	Mary J. Adams	32.6885	2,117
	Milan Church	123.7585	8,014
	Paisley Fund	41.5056	2,688
	Phoebe Sullivan	20.9738	1,358
	St. James Cross Creek	118.4520	7,670
	St. Michael's	59.8810	3,877
	Samuel L. Mather	2096.3492	135,741
	Toronto Church	314.8440	20,387
	Will H. Read	6.6092	428
	<b>Subtotal</b>	<b>16,405.2509</b>	<b>\$ 1,062,264</b>
Scholarship Funds	Sarah L. Leonard	951.1490	\$ 61,588
	Clergy Training	278.5420	18,036
	Demby-Ricks	1,499.7478	97,111
	Herbert Hornby Fund	6,003.5480	388,737
	Herbert Hornby Income	1,118.4043	72,418
	Nesbitt	127.5680	8,260
	Bexley Hall-Leonard Scholarship	413.7310	26,790
	Pauline Wade	481.1085	31,152
	C. C. Cowin	69.3873	4,493
	<b>Subtotal</b>	<b>10,943.1859</b>	<b>\$ 708,585</b>
Other Diocesan Organizations:			
Altar Guild	Altar Guild	252.2805	\$ 16,335
Bexley Hall	Bexley Hall	61.4830	3,981
Bishop Of Ohio	Discretionary Fund	2,408.5803	155,959
Church Home	Church Home Fund	49,145.4173	3,182,229
	Church Home Income Fund	6,765.1204	438,050
Camp & Conference Center	Endowment	6,292.0100	407,416
	Burroughs Hall Gift	8,060.3147	521,916
	Master Plan Fund	183.1204	11,857
	Emily Murray Memorial Fund	402.8034	26,082
Cooper Fund	Cooper Memorial Fund	1014.2173	65,672
Diocese of Ohio	Bishop's Fund for New Congregations	6123.0926	396,478
	Bishop's Residence Proceeds	830.1011	53,750
	Chaplaincy & City Missions	466.0900	30,180
	St. James Fund	1526.4586	98,840
	Deputies to General Convention	680.4340	44,059
	Centennial Fund	4830.8370	312,803
	Darnell Benevolent Fund	6036.9480	390,900
	Darnell Income Fund-TR	191.4671	12,398
	Francis Jackson Estate	1272.2883	82,382
	Dr. G. Leslie Miller Memorial Fund	38742.3990	2,508,620
	Dr. G. Leslie Miller Income Fund-TR	1245.1565	80,624
	Youth Scholarship Endowment Fund	186.1655	12,054
	Legacy Campaign - Arthur B. Williams, Jr. Fund	4313.3799	279,297
	Legacy Campaign - College Chaplaincies	264.8830	17,162
	Legacy Campaign - Kenyon College Chaplaincy	4591.3008	297,293
	Legacy Campaign Fund - Cedar Hills	841.4125	54,483
	Legacy Campaign - Congregational Development	959.6010	62,135

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPANTS IN THE BALANCED FUND  
DECEMBER 31, 2009

Diocesan Funds (Continued) :	Parish/Mission/Diocese	Number of Units	Market Value (Per Unit)	
			\$	64.75129304
	Legacy Campaign - ECSF	1304.2435		84,451
	Legacy Campaign - Greater Akron Development	1353.1653		87,619
	Legacy Campaign Fund - Hospital Chaplaincies	73.6642		4,770
	Legacy Campaign - Hosp. Chap. - Income	22.4992		1,457
	Legacy Campaign - Arthur B. Williams, Jr. - Income	115.2484		7,462
	Legacy Campaign - Kenyon College Chaplaincy - Income	562.5419		36,425
	Legacy Campaign - College Chaplaincies - Income	58.2462		3,772
	Legacy Campaign - Cong. Dev. - Income	56.1179		3,634
	Legacy Campaign - Gr. Akron Dev. - Income	205.0278		13,276
	Thornton Bequest	1279.7092		82,863
	Clark and Wendy Grew Endow for Youth Scholarships	578.9590		37,488
	Clark and Wendy Grew Endow for Youth Scholarships	351.6070		22,767
Diocesan Council	Bishop Leonard Capital Fund	42.5547		2,755
	Bishop Leonard Capital Fund - Two	51604.0781		3,341,431
	Operating Endowment	485.8536		31,460
	Investments	308.1014		19,950
	BLF Loans and Grants Fund	9276.1583		600,643
	EAF Loan Fund	9316.1742		603,234
	EAF Grant Fund	16676.7212		1,079,839
	SCTA	122.9770		7,963
	Disabled & Infirm Clergy Fund	2362.8880		153,000
	Bedell Fund	409.9630		26,546
	Disabled & Infirm Clergy Fund	7050.9490		456,558
	Disabled & Infirm Clergy Inc Fund-TR	1214.4823		78,639
	Leonard Bequest	485.7050		31,450
Girl's Friendly Society	K. L. Mather	114.2160		7,396
	Cornelia R. Ginn	67.0810		4,344
Holy Cross House for Crippled & Invalid Children	Holy Cross Fund	9407.4619		609,145
	Holy Cross Income Fund	2357.8628		152,675
Joint Education Fund Scholarship	Julia Bedell	409.9630		26,546
	Samuel L. Mather Mem (B) - Education	1058.3190		68,528
	Thompson Fund	360.2030		23,324
	Burton Scholarship	200.6770		12,994
Joint Education Fund Scholarship	Swayne Fund	388.5290		25,158
	Holland Memorial Fund	33.1280		2,145
	Sarah Leonard	48.5640		3,145
	William A. Leonard	173.4340		11,230
St. John's Home, Painesville	Bradford Principal	826.0860		53,490
	Brayton Principal	11281.0240		730,461
	Leonard Principal	2000.0000		129,503
St. John's Home, Painesville	Proceeds -TR	6709.5068		434,449
	Ellen King	237.7202		15,393
Trustees of the Diocese of Ohio	Vance Fund	217.8112		14,104
	Reycraft Memorial Fund	825.2491		53,436
	Vance Endowment	4226.4310		273,667
	Group Pension Plan & Trust	2585.0452		167,385
	Jackson & Martha Betts Fund	534.1014		34,584
	Oberlin - Anderson Bequest	792.9416		51,344
	The Robert C. Ella and Charlotte Bowman Fund	686.9414		44,480
	Guster Memorial	47.7270		3,090
	The Seaman Fund	49.9999		3,238
	The Seaman Fund - Income	15.5327		1,006
	A. Marie Brett Fund	65.2670		4,226
	The Foundation of Christ Church Episcopal, Lima	227.5806		14,736
	The Foundation of Christ Church Episcopal, Lima	466.2799		30,192
	Endowment, Bryan	5.9014		382

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPANTS IN THE BALANCED FUND  
DECEMBER 31, 2009

Parish/Mission/Diocese		Number of Units	Market Value (Per Unit) \$
<b>Diocesan Funds (Continued) :</b>			64,751,293.04
	William B. & Nellie H. Jenkins Trust Fund	692.1597	44,818
	William B. & Nellie H. Jenkins Trust Fund-Income	119.7256	7,752
Kenyon Summer Conference	Key to the Future Fund	518.3127	33,561
	Hargate/Russell Founders Fund	57.1144	3,698
Hannah M. Stocker	Capital Fund	348.7940	22,585
St. Agnes	Memorial Fund	385.7789	24,980
Episcopal Community Services Foundation	Restricted Endowment	6108.3959	395,527
	Board Designated Endowment	163.8132	10,607
	Work Among the Aging	2355.6173	152,529
	Outreach Endowment	130.1379	8,427
	GAR Fund	1892.5280	122,544
	<b>Subtotal Other Diocesan Organizations</b>	<b>312,197.9603</b>	<b>\$ 20,215,221</b>
	<b>Total Diocesan Funds</b>	<b>390,329.5704</b>	<b>\$ 25,274,347</b>
	<b>Total Parish/Mission Investment, Other Diocesan Organizations and Diocesan Funds</b>	<b>496,354.0416</b>	<b>\$ 32,139,566</b>

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPANTS IN THE MONEY MARKET INVESTMENT FUND  
DECEMBER 31, 2009

Parish/Mission/Diocese		Market Value (Per Unit \$1.00)	Number of Units
Alliance, Trinity Church	Lilly Lane Income Fund - Trinity	\$ 918	918.1000
	Trinity Choir Income Fund	1,899	1,898.9600
	Trinity Income Fund	6,761	6,761.4300
Cleveland, Cedar Hills	Easement Proceeds	102,437	102,436.6800
Cleveland, Diocese of Ohio	Clergy Ed. - Pauline Wade Income-UNR	8,777	8,776.7200
	Lloyd O'Keefe Fellowship Fund	7,194	7,194.2500
Cleveland, ECW	Fund	16,545	16,545.0800
Cleveland, Hannah Stocker	Hannah Stocker - Income Fund - TR	8,691	8,691.1900
Cleveland, Holy Cross	Holy Cross Income Fund-UNR	239,263	239,262.6400
Cleveland, Joint Education	Joint Education Fund - Income - TR	22,277	22,276.7200
Cleveland, Scholarship Income	Carlotta East - ECW	19,344	19,344.3700
	Nesbitt Fund	60,310	60,309.4800
	Income Fund-UNR	32,680	32,680.2800
Cleveland, St. John's Home	Bradford Income - TR	44,606	44,606.2310
	Leonard Income - TR	100,264	100,264.3000
	Rhodes Income	438,524	438,523.9900
Cleveland, St. Luke's Church	Fund	9,997	9,997.0300
Cleveland, Trustees of the Diocese of Ohio	C. C. Cowin Scholarship - Income Fund	2,297	2,296.7300
	Clergy Continuing Ed. Fund	2,380	2,379.6800
	Clergy Training - Scholarship Income - TR	7,177	7,177.2600
	Sarah Leonard Scholarship Income-BD	3,365	3,364.7600
	Undesignated - formerly RB& C Hospital	57,194	57,194.2300
Total		\$ 1,192,900	1,192,900.1110

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPATIONS ISSUED TO THE BALANCED FUND  
YEAR ENDED DECEMBER 31, 2009

Parish/Mission/Diocese	Cash	Units
Ashland, St. Matthew's	\$ 1,538	27.1543
Berea, St. Thomas Church	17	0.2970
Boardman, St. James' Church	206	3.6308
Bryan, Trinity Church	151	2.4305
Canton, St. Mark's Church	7,139	126.0628
Cleveland, Cedar Hills	509,335	8,060.3147
Cleveland, Cedar Hills	11,572	183.1204
Cleveland, Cedar Hills	24,605	402.8034
Cleveland, Church of the Transfiguration	99	1.7451
Cleveland, Church of the Transfiguration	Endowment	
Cleveland, St. John's Church	3,878	68.4759
Cleveland, St. John's Church	2,265	39.9913
Cleveland, St. Andrew's Church	1,888	33.3345
Cleveland, St. Andrew's Church	539	9.7231
Cleveland, Diocese of Ohio	105	1.8552
Cleveland, Diocese of Ohio	Bishop's Fund - Discretionary	
Cleveland, Diocese of Ohio	11,431	201.8328
Cleveland, Diocese of Ohio	Diocesan Missionary	
Cleveland, Diocese of Ohio	16,900	342.0830
Cleveland, Diocese of Ohio	Diocesan Missionary -Reinvested Income	
Cleveland, Diocese of Ohio	10,054	203.5029
Cleveland, Diocese of Ohio	Altar Guild	
Cleveland, Diocese of Ohio	783	13.8331
Cleveland, Diocese of Ohio	Bishop Leonard Capital Fund - TR	
Cleveland, Diocese of Ohio	4,667	83.0761
Cleveland, Diocese of Ohio	Kenyon Summer Conference - Key to the Future Fund	
Cleveland, Diocese of Ohio	1,610	28.4207
Cleveland, Diocese of Ohio	Kenyon Summer Conference - Hargate/Russell Founders Fund	
Cleveland, Diocese of Ohio	177	3.1319
Cleveland, Diocese of Ohio	The Church Home - Income	
Cleveland, Diocese of Ohio	221,803	3,912.0602
Cleveland, Diocese of Ohio	Legacy Campaign - Kenyon College Chaplaincies	
Cleveland, Diocese of Ohio	18,235	354.7612
Cleveland, Diocese of Ohio	Legacy Campaign Fund - Hospital Chaplaincies Income	
Cleveland, Diocese of Ohio	299	5.2729
Cleveland, Diocese of Ohio	Legacy Campaign - Arthur B. Williams, Jr.	
Cleveland, Diocese of Ohio	14,097	249.2129
Cleveland, Diocese of Ohio	Legacy Campaign - Kenyon College Chaplaincies Income	
Cleveland, Diocese of Ohio	1,747	30.8455
Cleveland, Diocese of Ohio	Legacy Campaign - College Chaplaincies Income	
Cleveland, Diocese of Ohio	1,003	17.7180
Cleveland, Diocese of Ohio	Legacy Campaign Fund - Congregation Develop. Income	
Cleveland, Diocese of Ohio	174	3.0772
Cleveland, Diocese of Ohio	Legacy Campaign Fund - Greater Akron New Work Income	
Cleveland, Diocese of Ohio	4,839	85.4402
Cleveland, Diocese of Ohio	Lloyd O'Keefe Outreach Endowment Fund	
Cleveland, Diocese of Ohio	2,000	32.4912
Cleveland, Diocese of Ohio	Operating Fund - Endowment	
Cleveland, Diocese of Ohio	6,881	136.1847
Cleveland, Diocese of Ohio	The Clark and Wendy Grew Endowment Fund for Youth Scholarships	
Cleveland, ECW	1,241	21.9391
Cleveland, Trustees of the Diocese of Ohio	Eliza J. Backus	
Cleveland, Trustees of the Diocese of Ohio	500	7.9126
Cleveland, Trustees of the Diocese of Ohio	Herbert Hornby Income Fund-Scholarship - TR	
Cleveland, Trustees of the Diocese of Ohio	22,890	404.9238
Cleveland, Trustees of the Diocese of Ohio	Bishop's Residence Proceeds	
Cleveland, Trustees of the Diocese of Ohio	2,578	45.5167
Cleveland, Trustees of the Diocese of Ohio	Bishop's Fund for New Congregations	
Cleveland, Trustees of the Diocese of Ohio	24,102	426.0635
Cleveland, Trustees of the Diocese of Ohio	Demby-Ricks Scholarship	
Cleveland, Trustees of the Diocese of Ohio	4,657	82.2356
Cleveland, Trustees of the Diocese of Ohio	Disabled & Infirm Clergy Income Fund - TR	
Cleveland, Trustees of the Diocese of Ohio	28,963	511.9551
Cleveland, Trustees of the Diocese of Ohio	Miller Income Fund - TR	
Cleveland, Trustees of the Diocese of Ohio	126,829	2,242.9781
Cleveland, Trustees of the Diocese of Ohio	Reycraft Memorial Fund	
Cleveland, Trustees of the Diocese of Ohio	2,563	45.2509
Cleveland, Trustees of the Diocese of Ohio	St. Agnes Church Memorial Fund	
Cleveland, Trustees of the Diocese of Ohio	1,198	21.1535
Cleveland, Trustees of the Diocese of Ohio	Seaman Fund - TR	
Cleveland, Trustees of the Diocese of Ohio	103	1.9850
Cleveland, Trustees of the Diocese of Ohio	Vance Fund (Cemetery lot maintenance)	
Cleveland, Trustees of the Diocese of Ohio	676	11.9433
Cleveland, Trustees of the Diocese of Ohio	The Foundation of Christ Church Episcopal, Lima - TR	
Cleveland, Trustees of the Diocese of Ohio	3,354	59.2170
Cleveland, Trustees of the Diocese of Ohio	Thomton Bequest - TR	
Cleveland, Trustees of the Diocese of Ohio	2,919	56.2919
Cleveland, Trustees of the Diocese of Ohio	William B. & Nellie H. Jenkins Trust Fund	
Defiance, Grace Church	2,521	44.5169
Elyria, St. Andrew's Church	Robertson Endowment	
Euclid, Church of the Epiphany	7,299	128.8822
Gambier, Harcourt Parish	Reserve Fund	
Macedonia, St. Timothy's Church	6,178	109.0905
Mansfield, Grace Church	Capital Drive Fund - Income	
Maumee, St. Paul's Church	514	9.0692
Maumee, St. Paul's Church	Ganter/Parish House	
Medina, St. Paul's Church	285	5.0300
Medina, St. Paul's Church	Endowment Fund	
Medina, St. Paul's Church	860	15.1798
Medina, St. Paul's Church	Memorial Fund	
Medina, St. Paul's Church	5,459	116.1344
Medina, St. Paul's Church	John Booker Davis	
Medina, St. Paul's Church	108	2.0937
Medina, St. Paul's Church	Fuller Memorial	
Medina, St. Paul's Church	228	4.4034
Medina, St. Paul's Church	Helen Kindig Thompson Ed. Fund	
Medina, St. Paul's Church	158	2.7953
Medina, St. Paul's Church	Staff Development Fund	
Medina, St. Paul's Church	101	1.7850
Medina, St. Paul's Church	Columbarium Fund	
	798	14.0990

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPATIONS ISSUED TO THE BALANCED FUND  
YEAR ENDED DECEMBER 31, 2009

	Parish/Mission/Diocese	Cash	Units
Medina, St. Paul's Church	The Searles Endowment	99	1.7542
Niles, St. Luke's Episcopal Church	Endowment Fund	10,041	177.8768
Oregon, St. Paul's Church	Property Endowment	619	10.9313
Oregon, St. Paul's Church	Endowment Fund	1,446	25.5293
Painesville, St. James' Church Foundation	Endowment	22,695	400.7309
Parma, All Saints Church	Endowment Fund	25,000	490.7914
Port Clinton, St. Thomas Church	St. Thomas Port Clinton Fund	1,685	29.7536
Put-in-Bay, St. Paul's Church	General Investment Fund	4,543	80.2156
Ravenna, Grace Episcopal Church	Youth Scholarship Fund	259	4.5680
Ravenna, Grace Episcopal Church	Mary Helen Beatty Endowment	32,005	565.6880
Sandusky, Grace Church	Lay Pension Plan	5,252	92.7307
Toledo, All Saints' Church	Katherine Bowles Fund	51	0.8982
Toledo, All Saints' Church	Memorial Fund	52	0.9129
Toledo, All Saints' Church	Rectory Fund	116	2.0418
Warren, Christ Church	Baiz Floral Fund	150	2.6502
Warren, Christ Church	Organ Maintenance Fund	655	11.5642
Warren, Christ Church	Outreach Fund	3,662	64.6647
Warren, Christ Episcopal Church	Bessie Proctor Floral Fund	47	0.8271
Warren, Christ Episcopal Church	Helen Roemer Garden Fund	2,075	36.6986
Youngstown, St. Augustine	St. Augustine Church Fund	75	1.3302
Total Participations Issued		\$ 1,237,646	21,058.4867



JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPATIONS REPAID FROM THE BALANCED FUND  
YEAR ENDED DECEMBER 31, 2009

Parish/Mission/Diocese	Cash	Units
Bryan, Trinity Church	Endowment Fund	
Cleveland, Diocese of Ohio	The Clark and Wendy Grew Endowment Fund for Youth Scholarships	\$ 5,835 90.1116
Cleveland, Diocese of Ohio	Legacy Campaign Fund - Arthur B. Williams, Jr. Fund-TR	600 10.7707
Cleveland, Diocese of Ohio	The Church Home - Income	11,104 193.3595
Cleveland, St. Andrew's Church	E.M. Davis Memorial	187,070 3,320.7245
Cleveland, St. John's Church	St. John Fund	5,000 84.3565
Cleveland, St. John's Church	Restoration Fund	5,000 77.2165
Cleveland, Trustees of the Diocese of Ohio	Herbert Hornby Income Fund-Scholarship-TR	10,000 154.4330
Cleveland, Trustees of the Diocese of Ohio	Bishop's Fund for New Congregations	23,400 388.8676
Cleveland, Trustees of the Diocese of Ohio	Disabled & Infirm Clergy Income Fund-TR	61,250 1,112.0280
Cleveland, Trustees of the Diocese of Ohio	Miller Income Fund - TR	18,905 338.0390
Cleveland, Trustees of the Diocese of Ohio	The Foundation of Christ Church, Lima, Ohio	99,258 1,755.3443
Coshocton, Trinity Church	Endowment Fund	25,000 386.0825
Euclid, Church of the Epiphany	Endowment	30,000 530.5856
Lorain, Church of the Redeemer	Preservation Fund	5,000 81.8546
Marion, St. Paul's Church	Endowment	20,000 320.7074
Maumee, St. Paul's Church	John Booker Davis	10,000 163.0825
Maumee, St. Paul's Church	Fuller Memorial	3,851 69.1295
Medina, St. Paul's Church	St. Paul Fund	8,099 145.3909
Medina, St. Paul's Church	Outreach Fund	8,000 134.9704
Niles, St. Luke's Episcopal Church	Endowment Fund	7,525 135.0825
Norwalk, St. Paul's Church	St. Paul Fund	20,000 331.1688
Parma, All Saints' Church	Endowment Fund	7,060 110.7762
Ravenna, Grace Episcopal Church	The Mary Helen Beatty Endowment Fund	15,000 231.6495
Shaker Heights, Christ Church	White Spire Fund of Christ Episcopal Church	26,643 434.7839
Warren, Christ Church	Helen Roemer Garden Fund	118,000 1,984.7361
		5,910 116.0205
Total Participations Repaid		<u>\$ 737,450 12,701.2721</u>

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPATIONS ISSUED TO THE MONEY MARKET INVESTMENT FUND  
YEAR ENDED DECEMBER 31, 2009

Parish/Mission/Diocese	Cash	Units
Alliance, Trinity Church	\$ 624	623.7100
	24	24.4300
	14,222	14,221.7300
Cleveland, Cedar Hills	35	34.2500
	9	8.6200
	178	178.4800
	4	4.0600
Cleveland, Diocese of Ohio	1,539	1,538.9300
	2	2.1600
Cleveland, ECW	(4)	(4.9200)
	2,240	2,240.5000
Cleveland, Hannah Stocker	1,116	1,116.3100
Cleveland, Holy Cross	65,859	65,858.8500
Cleveland, Joint Education	8,544	8,544.3300
Cleveland, Scholarship	892	891.5400
	222	222.1900
	5,235	5,235.1700
Cleveland, SCTA	3,040	3,039.5700
Cleveland, St. John's Home	7,557	7,557.2400
	2,649	2,649.1400
	6,412	6,412.1100
Cleveland, St. Luke's Church	27,337	27,336.8900
Cleveland, Trustees-Diocese of Ohio	(3)	(2.9700)
	13	12.6600
	-	0.5200
Total Participations Issued	\$ 147,746	147,745.5000

JOINT INVESTMENT FUND OF THE TRUSTEES  
OF THE DIOCESE OF OHIO  
PARTICIPATIONS REPAID FROM THE MONEY MARKET INVESTMENT FUND  
YEAR ENDED DECEMBER 31, 2009

Parish/Mission/Diocese		Cash	Units
Alliance, Trinity	Trinity Income Fund	\$ 16,200	16,200.0000
Cleveland, Cedar Hills	Easement Proceeds	30,239	30,239.1400
Cleveland, Cedar Hills	Burroughs Hall Gift	509,335	509,335.2900
Cleveland, Cedar Hills	Master Plan Fund	11,572	11,571.4700
Cleveland, Cedar Hills	Emily Murray Fund	24,605	24,604.8000
Cleveland, Holy Cross	Holy Cross Income Fund	6,580	6,579.9600
Cleveland, SCTA	Income Fund	2,393	2,393.0000
Cleveland, Scholarship Income	Nesbitt	5,000	5,000.0000
Cleveland, Trustees of the Diocese of Ohio	Clergy Ed. - Pauline Wade Income - UNR	1,200	1,200.0000
Total Participations Repaid		<u>\$ 607,124</u>	<u>607,123.6600</u>