

2022 Diocesan Report to the Executive Council of the Episcopal Church



Part I: Report of New and Closed Congregations

For the year ended December 31, 2022

In compliance with Canon I.4.6(j) and I.6.4

File online via the [DFMS filing site](#). For late submissions complete PDF form and email to the Executive Council c/o the Executive Office of the General Convention by September 1, 2023 at reports@episcopalchurch.org.

Diocese	<input type="text"/>	Province	<input type="text"/>
Street	<input type="text"/>	City	<input type="text"/>
State	<input type="text"/>	Zip + 4	<input type="text"/>
		Country	<input type="text"/>
Mailing Address	<input type="text"/>	City	<input type="text"/>
State	<input type="text"/>	Zip + 4	<input type="text"/>
		Country	<input type="text"/>
Email Address	<input type="text"/>	Website/ URL	<input type="text"/>

REPORT PREPARATION

Report prepared by

Phone

BISHOP

Name

Date Approved by Bishop

Report of New Congregations and Closures for the year ending December 31, 2022

The Diocese of: _____

Number of Congregations at beginning of year (January 1, 2022)	A		
Number of New Congregations (<i>new starts</i>) during 2022	B	+	
Number of Congregations closed during 2022	C	-	
Total number of Congregations at year end (December 31, 2022)	D	=	

Please list all new and closed congregations below: If you need more space, please include an additional page.

NEW CONGREGATIONS			
(Include missions)			
Name:	Street:	Region or Sub diocese	
Date Opened:	City/State/Zip:		
Name:	Street:	Region or Sub diocese	
Date Opened:	City/State/Zip:		
CLOSED CONGREGATIONS			
(Please indicate the date and reason for closing)			
Name:	Street:	Reason for closing	
Date Closed:	City/State/Zip:		
Name:	Street:	Reason for closing	
Date Closed:	City/State/Zip:		
MERGED CONGREGATIONS			
(Please indicate the date and reason)			
Existing Name:	New Merge Name:	Date Merged:	
Existing City:	New Merged Address: [Address/City/Zip]	Reason:	
Existing Name:	New Merge Name:	Date Merged:	
Existing City:	New Merged Address: [Address/City/Zip]	Reason:	
NAME CHANGES			
(Please indicate the date and any necessary notes)			
Current Name:	New Name:	Date of change:	
City:	Reason:		
Current Name:	New Name	Date of change:	
City:	Reason:		
CHANGE IN FILING STATUS			
Congregation Name:	Change to: <input type="checkbox"/> Filing <input type="checkbox"/> Non-filing	Date of change:	
Congregation Name:	Change to: <input type="checkbox"/> Filing <input type="checkbox"/> Non-filing	Date of change:	

2022 Diocesan Report to the Executive Council of the Episcopal Church



Part II: Operating Income and Audited Financial Statement

For the year ended December 31, 2022

In compliance with Canon I.4.6(i) and I.7

File online via the DFMS filing site. For late submissions complete PDF form and email to the Executive Council c/o the Executive Office of the General Convention by September 1, 2023 at dr@episcopalchurch.org

Diocese	Province
Street	City
State	Zip + 4
	Country
Mailing Address	City
State	Zip + 4
	Country
Federal Tax #	Email Address

REPORT PREPARATION

Financial Report Prepared by:	Phone
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AUDITED FINANCIAL STATEMENT

<input type="checkbox"/> An Audited Financial Statement is part of a complete Diocesan Report. Check here if your Audit Report is complete, and please attach an electronic copy with this form.	If Audit Report is not complete, please give the date you expect to submit it to Executive Council <input style="width: 100px;" type="text"/>
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*Please file this report by the September 1 even if your **Audited Financial Statement is not yet complete**. You will have an opportunity to make changes, if necessary, when a copy of the required audit is submitted.*

ADOPTED BUDGET

Please attach an electronic copy of the adopted budget for the reporting year.

BISHOP

Name	<input style="width: 95%;" type="text"/>
Date Approved by Bishop	<input style="width: 95%;" type="text"/>

CERTIFIED BY TREASURER/ FINANCIAL OFFICER

Certified by	<input style="width: 95%;" type="text"/>
Date Certified by Treasurer	<input style="width: 95%;" type="text"/>

Diocesan Report of Operating Income
FOR THE FISCAL YEAR ENDED DECEMBER 31, 2022

Revenue Used for Operations	From diocesan accounts or audited financial statements	Adjustments + or -	Adjusted Amount
I. a. Pledge payments from congregations	<input style="width: 100%;" type="text"/>		
<i>deduct</i> (amounts in adjustments column):			
b. Pledge bad debts reported as expense on accrual basis financial statements	-	<input style="width: 100%;" type="text"/>	
c. Reimbursements for items paid on behalf of congregations	-	<input style="width: 100%;" type="text"/>	
d. Other	-	<input style="width: 100%;" type="text"/>	<input style="width: 100%; background-color: #cccccc;" type="text"/>
II. a. Contributions from organizations	<input style="width: 100%;" type="text"/>		
<i>deduct</i> (amount in adjustments column):			
b. Reimbursements for items paid on behalf of other organizations or entities	-	<input style="width: 100%;" type="text"/>	<input style="width: 100%; background-color: #cccccc;" type="text"/>
III. a. Investments used for operations (dividends, interest and/or principal transferred from trusts, investments & endowments) <u>Not</u> total principal.	<input style="width: 100%;" type="text"/>		
<i>add</i> (amounts in adjustments column):			
b. Operating expenses paid directly from trusts or endowments	+	<input style="width: 100%;" type="text"/>	
<i>deduct</i> (amount in adjustments column):			
c. Amount from operating budget added to investments or endowment	-	<input style="width: 100%;" type="text"/>	<input style="width: 100%; background-color: #cccccc;" type="text"/>
IV. a. Unrestricted gifts and bequests	<input style="width: 100%;" type="text"/>		
<i>add</i> (amounts adjustments column):			
b. Funds used from gifts or bequests received in previous years	+	<input style="width: 100%;" type="text"/>	
<i>deduct</i> (amount in adjustments column):			
c. Amounts added to investment or endowment balances	-	<input style="width: 100%;" type="text"/>	<input style="width: 100%; background-color: #cccccc;" type="text"/>
V. a. Other operating income (e.g., grants, rental income, miscellaneous income)	<input style="width: 100%;" type="text"/>		
<i>add</i> (amount in adjustments column):			
b. Operating expenses paid by other organizations or entities	+	<input style="width: 100%;" type="text"/>	
<i>deduct</i> (amounts in adjustments column):			
c. Direct expenses associated with rental income (in V.a.)	-	<input style="width: 100%;" type="text"/>	
d. Amounts collected for the benefit of non-operating programs or entities	-	<input style="width: 100%;" type="text"/>	
e. Reimbursements for costs incurred for the benefit of non-operating programs or entities	-	<input style="width: 100%;" type="text"/>	
f. Revenue recorded from contributed services	-	<input style="width: 100%;" type="text"/>	
g. Grants received from Church Center for operations assistance	-	<input style="width: 100%;" type="text"/>	<input style="width: 100%; background-color: #cccccc;" type="text"/>
Total adjusted operating income =			<input style="width: 100%; background-color: #cccccc;" type="text"/>

Diocese of: _____

Stewardship and Financial Information Continued

Question 1: What is the diocesan formula for assessments/apportionment?

Question 2: Does the diocese use the parochial report financial data in determining diocesan assessments?

Yes No

Question 3a: Do you require additional information or a supplemental form as part of parochial report filing?

Yes No

3b: If yes, what information is requested?

Question 4: Has there been an increase in the number of congregations in arrears on assessment/apportionment?

Yes No N/A

Question 5: How many total congregations in arrears in 2020? _____

Question 6: How many total congregations in arrears in 2022? _____

Question 7: How significant is the negative impact of the pandemic on diocesan finances for 2022?

Very significant Somewhat significant Neutral Somewhat insignificant Very insignificant

Comments:

Question 8: What opportunities and challenges did the diocese face in 2022?