



# Diocese of Southern Ohio

## Mission Share Review Policy/Process

Responsible Organization:

Diocesan Council

Revision Number: Final

Revision Date: 04/08/2017

Approved by: The Rt. Rev Thomas Breidenthal  
Bishop, Diocese of Southern Ohio

Approval Date: 4/08/2017

### 1. Theological Context

The Diocese has adopted this policy in the interest of promoting our common life in service to God's mission as the Diocese of Southern Ohio reflective of the bounty with which God has blessed us. This policy will help strengthen the ties that bind us together and enable us to increase the ways in which we collectively participate in God's mission of restoration and reconciliation.

Scripture tells us:

"Our desire is not that others might be relieved while you are hard pressed, but that there might be equality. At the present time your plenty will supply what they need, so that in turn their plenty will supply what you need. The goal is equality, as it is written: 'The one who gathered much did not have too much, and the one who gathered little did not have too little.'" (2 Cor 8:13-16)

"In everything I did, I showed you that by this kind of hard work we must help the weak, remembering the words the Lord Jesus himself said: 'It is more blessed to give than to receive.'" (Acts 20:35)

"Jesus answered, 'If you want to be perfect, go, sell your possessions and give to the poor, and you will have treasure in heaven. Then come, follow me.'" (Matt 19:21)

### Our Mutual Responsibility and Interdependence as the Body of Christ

In his first letter to the church at Corinth, Chapter 12, St. Paul outlines what it means for the church to be the Body of Christ in the world. Just as the human body is an integrated, inter-dependent system, so also is the church. And in that same chapter, St. Paul makes it clear that:

- no part of the body can reject another part without sacrificing its own integrity
- every member must support the work of the other parts for the body to work the way God designed it.

"Those parts of the body that seem to be weaker are indispensable, and the parts that we think are less honorable we treat with special honor." (I Cor. 12:21)

So it is in the life of our Diocese. Each member congregation brings a special gift to the life and work of the Diocese, and each congregation requires the support and gifts of the other members of the diocesan body to become most fully the organic Eucharistic community that God desires for us to be. This being true, our life together in the Diocese of Southern Ohio requires us to be mutually accountable, one to another, not only for the welfare of our brothers and sisters but also to build up our local eucharistic communities as the Body of Christ in faithfulness to God's mission.



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### **Our Mutual Accountability and Responsibility**

The Episcopal Church lives within the Anglican tradition of catholicity, under the oversight of bishops, as opposed to a congregational system of independent congregations. Our local eucharistic communities are interdependent. There are huge benefits of being part of our Diocese – In giving we share and receive empathy, healing, support, advice, fellowship, professional and spiritual wisdom, companions for the journey. We are not complete without each other.

The purpose of this policy is to remind all of the congregations that together constitute the Diocese of Southern Ohio of our common obligations for mutual support, justice, reconciliation and encouragement among congregations in meeting those obligations.

### **2. Policy:**

The Canons of the Diocese of Southern Ohio require that a congregation pay its Diocesan Assessment, otherwise known as Mission Share payment on a monthly basis (Canon XIII, Section 6). Failure to pay the full amount by June 30 of the following year (Canon XVI, Section 18 (a. 2)) can result in a parish being listed as a “congregation at risk” (Canon XVI, Section 19, (b. 5)) or to lose church status and be designated a mission (Canon XVI, Section 17, (c)).

The policy of the Diocese of Southern Ohio allows for a congregation to request a “Mission Share Review” of the upcoming year’s designated percentage. The policy does not allow for a review of prior year amounts that are due to the Diocese. Prior amounts due need a payment plan set up to have those amounts paid off within a specific timeframe subject to approval by Diocesan Council. Forgiveness or reductions of prior amounts due will not be given unless Diocesan Council makes an exception.

Further, it is the policy of the Diocese that a congregation which is one year behind in its Mission Share payments/Assessment will be contacted by the Mission Share Review Committee to see how the Diocese can assist them in resolving this past due debt so that the parish is not placed as a congregation at risk.

Additionally, it is the policy of the Diocese that congregations who are in good standing by keeping their mission share payments current are granted:

- preference for appointments to diocesan committees and councils at the discretion of the bishop(s)
- eligibility to seek grants and loans from the diocesan-wide resources
- permission to move forward in a search for a rector or appointment of an assistant/associate

Conversely, those congregations which are not current with their mission share payments are enjoined from participating in the above privileges. In addition, Canon XVI, Section 18 (b) states that



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congregations that are not current with their mission payments “shall be denied Lay representation at the year’s Diocesan Convention.” See section 3 below for further discussion.

### 3. Purpose:

The purpose of this document is to state the policy of the Diocese and identify the organizations of the Diocese who are involved in the Mission Share Review process and define their responsibilities. The appendices provide the process in detail as well as guidelines and instructions.

The underlying causes for a congregation’s financial difficulties can be many, and the solutions must be tailored for each situation. It is necessary however to ensure that the review process is first and foremost a pastoral issue. The process must be fair and balanced, but also must provide a positive experience to the congregation so it may continue to be a vibrant member of the Church.

As described in the Canons of the Diocese of Southern Ohio, section 18 (a) 2 requires a Congregation in Good Standing must pay “its full Diocesan assessment for the preceding calendar year by June 30 of any year or by one week before the scheduled meeting of the Convention if that precedes June 30.” Due to circumstances often outside the control of a congregation, the above canon sometimes levies an undue financial hardship on the life of the congregation. The duty of Diocesan leadership is to ensure that such events are recognized and the congregations in question are allowed to maintain their status within the Diocese, while balancing their financial needs with their responsibilities as members of the larger Diocesan family.

### 4. Scope:

This Mission Share Review Process applies to all individuals and organizations defined below, including Diocesan Staff personnel, which are involved with the Mission Share Review Process. The Diocesan Council is primarily responsible for the Mission Share Review policy/process and will review the policy/process on not less than an annual basis and amend it, as required.

It is imperative for all parties involved to fully understand that a Mission Share Review evaluates the Mission Share that is in place for the current year and does so in response to a request of the parish received in the prior year after the mission shares were calculated and published. The Mission Share Review Committee cannot review the Mission Share that was in effect during the year of the request, nor adjust the share for prior years. The Review Committee may, at its discretion, recommend forgiveness of Mission Share amounts that are currently in arrears as part of an overall financial recovery package. This limitation underscores the importance of accomplishing the reviews in a timely manner. It also places a requirement on the congregations themselves to alert the Diocese as soon as possible if they will request a mission share review.

### 5. Timeline

The following represents the timeline for Mission Share publication and review process:



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<i>Date</i>	<i>Item</i>	<i>Action</i>
<b>Mid June</b>	Diocesan Finance Officer publishes draft Mission Shares for the upcoming year.	Vestries and Treasurers review and plan into their budget or initiate a mission share review.
<b>September</b>	Diocesan Finance Officer publishes Mission Shares for the upcoming year for inclusion in Convention Budget	Vestries/treasurers return notification to Finance Officer to concur or notify Diocese that a Mission Share review will be requested. Requesting a Review <b>does not</b> relieve a parish of published Mission Share.
<b>30 October</b>	<b>Mission Share Review Letter Deadline</b>	Requests for Mission Share Reviews must be received so a review can be scheduled and potential shortfalls are planned in the Diocesan Budget.
<b>Seven days after receipt of request</b>	Mission Share Review Request is acknowledged and Review Package instructions forwarded to the parish.	Diocesan Staff sends package of instructions and notifies Diocesan Council of request
<b>Next Diocesan Council Meeting</b>	Council accepts review request	Mission Share Chair begins preparation for review and notifies Commissions of upcoming review to assign personnel.
<b>30-45 days after receipt of package instructions</b>	Parish submits completed Mission Share Review package	Mission Share Chair and Diocesan Staff distributes Mission Share Review Package to Team Members and coordinates meeting date with parish and Team.
<b>As Required</b>	Mission Share Review	Review is held with Team and parish. Initial findings of the Review Team are shared with the parish. Recommendations of Team forwarded in writing to Diocesan Council
<b>Next Diocesan Council Meeting</b>	Diocesan Council Review	Diocesan Council reviews recommendation of Team. Accepts or modifies the recommendation and adjusts Diocesan Budget to accommodate changes.
<b>Diocesan Council Follow Up</b>	Diocesan Council Determination	Council First Vice President and/or Team Leader notifies the parish of its final finding in writing with copies to Diocesan Finance Officer and Commission for action if required.

### 6. Responsibilities:

**Diocesan Council:** As the canonically assigned body responsible to “carry out the programs and policies, to set up and implement the operating budget, and to make related expenditures for the Mission and Ministry of the Diocese of Southern Ohio,” Diocesan Council will be notified by the Canon to the Ordinary (or other assigned member of the Diocesan Staff) that a Mission Share Review request has been made. Council will vote to accept performing the review and the Mission Share Review Committee will lead the review and report back to Council, in writing, the findings of the review. Council will discuss the findings and recommendations and vote to implement the



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recommendations (as potentially amended). This vote includes amendment of the budget if required. The Mission Share Review Committee Chair will transmit the Council's decision to the affected parish, the Diocesan Finance Officer and other parties involved with the review.

**Canon to the Ordinary** (or other assigned member of the Diocesan Staff) will receive requests from requesting parishes, notify Diocesan Council, and the Mission Share Review Chair, to transmit instructions for the review package. The Canon will be a member of the review committee and attend the meeting, if possible.

**Diocesan Finance Officer** will provide a history of the requesting parish's parochial report to the committee as well as a funds remaining report on any budgeted mission share line item funds available. The Finance Officer will provide professional expertise to the Review Committee for analysis of the congregation's budget and investments as well as guidance on potential impacts to the Diocesan budget and cash flow and possible options for alternative reductions in a congregation's mission share liabilities.

**If the Diocesan Finance Officer is unable to attend a parish review, a representative of the Finance Committee** will assign a person to be a member of the Review Committee who will review the overall fiscal status of the congregation including endowments, investments and cash accounts to ensure they are being accounted for correctly, and are being used to the best advantage and return.

**The Commission on Congregational Life** will assign a person to the review committee who will evaluate the overall operation and functioning of the congregation paying particular attention to its outreach, participation in the community and other local churches, physical plant and the health of the congregation. If required following the review, the assigned person will report back to the Commission for future COCL action including potential financial support in accordance with their process and procedures.

### 7. Procedures:

During the distribution of the draft Mission Share Assessment, the Diocesan Finance Officer will include a notification to the congregations that they may request a review of the assessed amount by Diocesan Council by making a written request to Council through the Canon to the Ordinary. This notification will also be included in the final notice for assessment amount distributed in the summer for use in the final budget preparation.

Upon receipt of a request, the Canon to the Ordinary will distribute copies to the First Vice President of Diocesan Council and the Chair of the Mission Share Review Committee. The Canon will acknowledge the request to the congregation and include instructions (Appendix B) for the preparation of a Mission Share Review packet that must be completed and submitted within six weeks of notification. This must be received before a review can be scheduled. The congregation will also prepare to discuss their request at a meeting with the review committee. The congregation will ensure that, as a minimum, the rector or assigned clergy person, the Senior Warden, the Treasurer and



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representatives from the Vestry or Mission Council are present at the meeting.

The Mission Share Review Chair or delegate will coordinate a schedule for the review at the congregation's facility. The remaining committees will inform the Canon of their respective assigned members to the Review Committee Chair.

At the Review Meeting itself, the Committee will meet with the representatives from the congregation to receive their request. Following the presentation, if necessary, the members of the Review Committee will meet one-on-one with their congregational counterparts to further review their status.

Following the review, the chair will caucus the Review Committee to receive their assessments and recommendations. If appropriate, the Committee will meet the congregational representatives immediately thereafter to provide their findings. The Review Committee chair will document these findings and present them to Diocesan Council at their next meeting for acceptance or modification. The chair will transmit the final disposition to the congregation by letter with copies to the other involved commissions for their information and action if follow up activity is required.