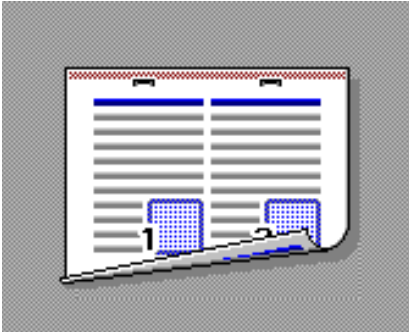


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**ENGAGING  
ALL  
DISCIPLES**  
CALLED, FED, AND SENT  
THE EPISCOPAL DIOCESE OF IOWA



# Reports to the 167<sup>th</sup> Annual Convention October 26-27, 2019

These reports are available on the  
Diocesan website: [www.iowaepiscopal.org](http://www.iowaepiscopal.org)

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Wifi will be available in the Plenary sessions at Convention for paperless online viewing from the website.

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The Rt. Rev. Alan Scarfe, Bishop of Iowa

**2018 CONFIRMATIONS, RECEPTION, VISITATION OFFERINGS RECEIVED**

No official visitation (or confirmations at another church) from congregations in these cities:  
Anamosa, Ankeny, Bettendorf, Boone, Chariton, Clermont, Clinton, Coralville, Denison, Dubuque, Emmetsburg, Glenwood, Grinnell, Harlan, Independence, Iowa Falls, Keokuk, Mason City, Newton, Ottumwa, Perry, Sioux City (St. Thomas' and St. Paul's), Storm Lake

	Confirmed		Received	Total	Visitation Date	Visitation Offering
	Children	Adults				
Algona, St. Thomas'				0	12/23/2018	230.00
Ames, St. John's by the Campus	2	2		4	12/17/17 10/20/2018	430.00 30.00
Burlington, Christ	1			1	8/12/2018	@ Mt. Pleasant
Carroll, Trinity (Trinity Cluster, w/Denison & Harlan)		1		1	9/30/2018	150.00
Cedar Falls, St. Luke's			1	1	9/23/2018	@ Waterloo
Cedar Rapids, Christ	5			5	11/4/2018	590.50
Cedar Rapids, Grace	1			1	1/21/2018	307.00
Charles City, Grace				0	10/7/2018	33.00
Council Bluffs, St. Paul's			3	3	4/8/2018	37.00
		2		2	12/16/2018	98.75
Davenport, St. Alban's	3		1	4	2/18/2018	138.00
Davenport, Trinity Cathedral		1	1	2	2/18/2018 12/2//2018	@ St. Albans, Davenport 60.49
Decorah, Grace				0	5/6/2018	85.00
Des Moines, Cath. Church of St. Paul					1/7/2018	244.16
	3	1	0	4	11/18/2018	
Des Moines, St. Andrew's	2	1		3	12/9/2018	
Des Moines, St. Luke's	4			4	9/9/2018	290.15
Des Moines, St. Mark's	3			3	12/9/2018	@ St. Andrew's DSM
Durant, St. Paul's				0	1/28/2018	644.00
Fort Dodge, St. Mark's	4			4	5/20/2018	
Fort Madison, St. Luke's				0	2/11/2018	100.00
Indianola, All Saints'				0	4/22/2018	35.00
Iowa City, Trinity	1	2	2	5	12/3/2017 10/18/2018	17.76 399.00
LeMars, St. Geroge's				0	6/3/2018	120.00
Maquoketa, St. Mark's				0	4/29/2018	82.50
Marshalltown, St. Paul's		2		2	3/4/2018	50.00
Mount Pleasant, St. Michael's		2		2	8/12/2018	303.00
Muscatine, Trinity	7			7	5/27/2018	129.00
Orange City, Church of the Savior		2		2	11/11/2018	
Oskaloosa, St. James'				0	9/16/2018	200.00
Shenandoah, St. John's				0	7/22/2018	200.00
Sioux City, Calvary	5	1		6	9/2/2018	272.00
Spirit Lake, St. Alban's		3		3	6/3/2018	90.00
Waterloo, Trinity	1			1	9/23/2018	339.90
Waverly, St. Andrew's				0	3/18/2018	40.00
Webster City, Good Shepherd	4		0	4	5/20/2018	232.00
West Des Moines, St. Timothy's	8	1		9	5/13/2018	406.25
<b>TOTALS:</b>	<b>53</b>	<b>21</b>	<b>8</b>	<b>82</b>		

### ORDINATIONS TO THE PRIESTHOOD

Elizabeth Cone Preston	St. Alban's Church, Spirit Lake	July 15, 2018
Stephen Mark Benitz	St John's Church, Mason City	July 17, 2018
Sinclair Conrad Paul Ender	Trinity Cathedral, Davenport (with Bishop Carl Wright, preacher)	July 19, 2018

### ORDINATIONS TO THE DIACONATE

#### Canon III.8 – transitional

Joan Elizabeth Farstad	St. Luke's Church, Cedar Falls	February 22, 2017
Stephen Mark Benitz	Cathedral Church of St. Paul, Des Moines	December 16, 2017
Sinclair Conrad Paul Ender	Cathedral Church of St. Paul, Des Moines	December 16, 2017
Elizabeth Cone Preston	Cathedral Church of St. Paul, Des Moines	December 16, 2017

### CANDIDATES FOR HOLY ORDERS

James Allen (Jake) Andrews, III	Trinity Church, Iowa City	March 24, 2018
Nicola Bowler	St. John's by the Campus, Ames	March 24, 2018
Catherine Harriet Mears	St. Paul's Church, Grinnell	March 24, 2018
Zebulun Bevans Treloar	Cathedral Church of St. Paul, Des Moines	March 24, 2018
Kevin Thomas Powell	Church of the Saviour, Clermont	August 24, 2018

### POSTULANTS FOR HOLY ORDERS

Kevin Thomas Powell	Church of the Saviour, Clermont	October 4, 2014
Nicola Bowler	St. John's by the Campus, Ames	January 10, 2015
Catherine Harriet Mears	St. Paul's Church, Grinnell	September 12, 2015
Jennifer Briggs Latham	St. Paul's Church, Grinnell	February 20, 2016
Elizabeth Cone Preston	St. Alban's Church, Spirit Lake	April 2, 2016
Stephanie Ann Ruth Jones [Blake]	St. Andrew's Church, Waverly	August 13, 2016
Susan Maureen Tierney	St. Timothy's Church, West Des Moines	August 13, 2016
Elizabeth Walters Gillman	St. Andrew's Church, Des Moines	September 24, 2016
Robin Lee Sade	St. Alban's Church, Davenport	February 11, 2017
Miriam Ruth Smith	St. Paul's Church, Council Bluffs	April 8, 2017
James Allen (Jake) Andrews, III	Trinity Church, Iowa City	April 8, 2017
Zebulun Bevans Treloar	Cathedral Church of St. Paul, Des Moines	Nominated 5/15/16 July 22, 2017
Ann Marie Ames-Papouchis	St John's Church, Mason City	Nominated 3/21/17 January 13, 2018
Nora Banister Conley Boerner	Trinity Church, Iowa City	January 13, 2018
Jesse Michael Angelo	Grace Church, Decorah	August 18, 2018
Catherine Ann Schroeder	Grace Church, Boone	August 18, 2018

### MINISTRY TEAM GRANTED POSTULANCY

Trinity Episcopal Church, Emmetsburg	September 24, 2016
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### NOTICE OF AN ACCORD

Curtis Roghair Moermond	Temporary Suspension from ordained ministry	<u>Effective date</u> November 4, 2018
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## CANONICAL RESIDENCE TRANSFERRED FROM DIOCESE OF IOWA

	<u>To</u>	<u>Effective date</u>
Lydia Kelsey Bucklin	Diocese of Northern Michigan	June 5, 2018

## CANONICAL RESIDENCE TRANSFERRED TO THE DIOCESE OF IOWA

	<u>From</u>	<u>Effective date</u>
Kim Turner Baker	Diocese of Washington	October 18, 2018
Hal Thomas Ley Hayek	Diocese of Maryland	October 19, 2018

## RENEWAL OF MINISTRY AND WELCOMING OF A RECTOR

Renewal of Ministry and Welcome of The Rev. Kevin Goodrich as Rector of St. John's Church, Dubuque	April 27, 2018
Renewal of Ministry and Welcome of The Rev. Hal Ley Hayek as Rector of Christ Church, Cedar Rapids	November 4, 2018
Renewal of Ministry and Welcome of The Rev. Kim Turner Baker as Rector of St. John's by the Campus, Ames	November 29, 2018

## SPECIAL SERVICES

Service Celebrating the Life of Warren Fredrick Frelund, Deacon (1943-2018) St. John's Church, Mason City, Iowa	February 17, 2018
Commissioning of new team beginning formation, St. Alban's Church, Davenport	February 18, 2018
Services of Lament and Response to Gun Violence at St. Paul's Cathedral, Des Moines and at the Bishop's invitation, around the Diocese: St. Paul's, Grinnell: 17 Tolls of the Bell for Marjory Stoneman Douglas High School 2:15pm Trinity, Waterloo: Vigil of Lamentation for Victims of Violence 6:50pm Christ, Clinton: Eucharist with prayers, litany, and lamentation for victims of violence 11:00am Trinity Cathedral, Davenport: Vigil Against Violence 12:30pm Grace, Cedar Rapids: Service of Lament for Gun Violence 6:00pm St. John's, Dubuque: Eucharist with prayers and lamentation for victims of violence 12:10pm, and Evening Prayer 6:00pm.	March 14, 2018
Chrism Mass and Renewal of Ordination Vows, Cathedral Church of St. Paul	March 26, 2018
Secularization of a Consecrated Building: Grace Episcopal Church, 205 S. 2nd St., Albia	June 6, 2018
Memorial Service with Eucharist for Alexander A. Aiton with committal in columbarium, St. John's by the Campus, Ames	August 11, 2018
Consecration of Andrew Swift as Bishop of Brechin, Scotland Convention Evensong, with Bishop Epting, officiant; Andrew Swift, preacher	August 25, 2018
Convention Eucharist, with Presiding Bishop Curry preacher; Bishop Scarfe, celebrant	October 27, 2018
25th Anniversary recognition of St. Paul's as a Cathedral, Des Moines	October 28, 2018
Celebration of Ministry of Elliott Blackburn, St. Matthew's by the Bridge, Iowa Falls	November 18, 2018
	November 18, 2018



## DEATH OF A CLERIC

The Rev. Charles R. Summers, Priest (1930 – 2018)	February 8, 2018
The Rev. Warren Frederick Frelund, Deacon (1943 – 2018)	February 13, 2018
The Rev. Donald G. Twentyman Jr., Deacon (1941 – 2018)	April 12, 2018
The Rev. Canon Arthur P. Becker, Priest (1928 – 2018)	June 22, 2018
The Rev. Canon Alexander A. Aiton, Priest (1949 – 2018)	July 30, 2018

## CONSENT TO THE RESIGNATION OF A BISHOP

Shannon J. Johnston	Diocesan, Diocese of Virginia	October 9, 2018
Dena A. Harrison	Suffragan, Diocese of Texas	December 3, 2018
Herman Hollerith	Diocesan, Diocese of Southern Virginia	December 4, 2018

## CONSENT TO HOLD AN ELECTION OF A BISHOP

Bishop Suffragan	Diocese of Texas	August 31, 2018
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## CONSENT TO THE ELECTION OF A BISHOP

Kevin Nichols	Diocesan, Diocese of Bethlehem	May 16, 2018
Michael Buerkel Hunn	Diocesan, Diocese of Rio Grande	June 6, 2018
Carlye J. Hughes	Diocesan, Diocese of Newark	June 20, 2018
Mark Cowell	Diocesan, Diocese of Western Kansas	June 23, 2018
Cathleen Chittenden Bascom	Diocesan, Diocese of Kansas	November 8, 2018

## LICENSED MINISTRIES

### Worship Leader

<p><b>Algona, St. Thomas'</b> Curry, Ormond (2020) Gilmore, Jeff (2020) Goecke, Barb (2020) Kortenber, John (2020)</p> <p><b>Carroll, Trinity</b> Henderson, Keith (2021) Henderson, Kandis (2121)</p> <p><b>Cedar Rapids, Grace</b> Wilson, Doug (2019) Wunschel, Jayne (2019)</p> <p><b>Clinton, Christ</b> Brown, Carolyn (2019) Leonard, Pierre (2019) Malli, Nancy (2019)</p> <p><b>Council Bluffs, St. Paul's</b> Christie, Barbara (2019) Craft, Betty (2019) Haggerty, Abigail (2019) Moore, Annaleah (2019) Moore, Mike (2019) Schmidt, Kari (2019) Schmidt, Matt (2019) Turner, Lois (2019)</p>	<p><b>Council Bluffs, St. Paul's (cont.)</b> Vanderpool, Beth (2019) Yowell, Mollie (2019)</p> <p><b>Davenport, Trinity Cathedral</b> Hoffman, Keith (2022)</p> <p><b>Denison, Trinity</b> Block, Carol (2021)</p> <p><b>Emmetsburg, Trinity</b> Flynn, Melanie (2019) Gress, Bob (2019) Gress, Sue (2019) Nixon, Dave (2019) Nixon, Judy (2019)</p> <p><b>Harlan, St. Paul's</b> Early, Bill (2021) Ouren, Randy (2021) Petsche, Sandra (2021) Schulte, Thomas (2021)</p> <p><b>Independence, St. James'</b> Stahl, Wanda (2019)</p> <p><b>Iowa Falls, St. Matthew's</b> Hansen, David (2019) Meyer, Larry (2019)</p>	<p><b>Mason City, St. John's</b> Schirmer, Dale (2019) Leaman, Jay (2021) Papouchis, Ann (2021) Paxson, Rich (2021)</p> <p><b>Mount Pleasant, St. Michael's</b> Campbell, Joseph (2021) Danielson, Cyndy (2021) Fitz-Randolph, Penny (2021) Miyoshi, Carmen (2021) Gwamna, Bisi (2121)</p> <p><b>Ottumwa, Trinity</b> Brown, Su (2021) Johns, Michael (2021) Krieger, Don (2021) Logan, Carol (2021) Neis, Mary (2021) Shafer, Marta (2021)</p> <p><b>Perry, St. Martin's</b> Powell, Kathy (2019) Ruggle, Don (2019)</p> <p style="text-align: center;"><b>(Continued next page)</b></p>
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Worship Leader (cont.)

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**Webster City, Good Shepherd**

Flowerday, Barbara (2019)  
Katschke, Robbie (2019)  
Leksell, Deb (2019)  
Martin-Schwarze, Angie (2019)  
Mason, Karen (2019)  
Mason, Richard (2019)  
Masser, Rhonda (2019)  
McLaughlin, Judy (2019)  
Ubben, Kelly (2019)

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**Eucharistic Minister**

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**Algona, St. Thomas'**

Curry, Ormond (2020)  
Gilmore, Jeff (2020)  
Goecke, Barb (2020)  
Simonson, David (2020)

**Carroll, Trinity**

Henderson, Kandis (2021)  
Henderson, Keith (2021)

**Cedar Rapids, Grace**

Barker, Cody (2019)  
Bensman, John (2019)  
McIrvin, Kim (2019)  
Thompson, Rhett (2019)  
Thompson, Sarah (2019)  
Wilson, Doug (2019)

**Clinton, Christ**

Bruggenwirth, Lorrie (2019)  
Geltz, Julie (2019)  
Leonard, Pierre (2019)  
Mabee, Carol (2019)  
Nieland, Nancy (2019)

**Council Bluffs, St. Paul's**

Bergansen, Katie (2019)  
Christie, Barbara (2019)  
Craft, Betty (2019)  
Gigliodoro, Dee (2019)  
Haggerty, Abigail (2019)  
Moore, Annaleah (2019)  
Moore, Mike (2019)  
Schmidt, Kari (2019)  
Schmidt, Matt (2019)  
Turner, Lois (2019)  
Vanderpool, Beth (2019)  
Yowell, Mollie (2019)

**Davenport, St. Alban's Church**

Rodriguez, Sherry (2019)

**Davenport, Trinity Cathedral**

Brooke, Karen (2020)  
Burrough, Donald (2020)  
Chaney, Kelly (2020)  
Ford, Mike (2020)  
Gardner, John (2020)  
Green, Ann (2020)  
Hoffman, Keith (2020)  
Hogg, Mary (2020)  
Nowinski, Frank (2020)  
Ohnemus, James (2020)  
Parry, Jan (2020)  
Peterson, Peter (2020)  
Sidney, Kelvin (2020)  
Sidney, Kent (2020)  
Smith, Esther (2020)  
Thomsen, Kim (2020)  
Ungurean, Karl (2020)

**Denison, Trinity**

Block, Carol (2021)

**Des Moines, St. Paul's Cathedral**

Beeston, R. Bruce (2021)  
Davis, Jean (2021)  
Gillespie, Catherine (2021)  
Hendrick, Bill (2021)  
Hendrick, Donna (2021)  
Jeneary, Scott (2021)  
Melton, Phyllis (2021)  
Thompson, Shelley (2021)  
Thompson, Tom (2021)  
Weisenborn, Kimela (2021)  
Whipple, Anna (2021)  
Willey, Barbara (2021)  
Wootten, Skeet (2021)

**Emmetsburg, Trinity**

Flynn, Melanie (2019)  
Gress, Bob (2019)  
Nevenhoven, Norm (2019)  
Nixon, Dave (2019)

**Harlan, St. Paul's**

Petsche, Allen (2021)  
Schulte, Thomas (2021)

**Independence, St. James'**

Stahl, Wanda (2019)

**Iowa City, Trinity**

Ong, Sandra (2019)  
Boerner, Nora (2020)  
Capps, Amber (2020)  
Capps, Jeff (2020)  
Cowan, John (2020)  
Cox, Charles (2020)

**Iowa City, Trinity (cont.)**

Crosmer, Julianne (2020)  
Hayes, Brian (2020)  
Holton, Ann (2020)  
Jones, Mo (2020)  
Laughlin, Mary (2020)  
McElroy, Betsy (2020)  
Soucek, Mary (2020)  
Stence, Beth (2020)  
Wilbur, Deb (2020)  
Wilbur, Jason (2020)  
Wilson, Ruth (2020)

**Iowa Falls, St. Matthew's**

Hansen, David (2019)  
Meyer, Larry (2019)

**Mason City, St. John's**

Schirmer, Dale (2019)  
Cornick, Jeanne (2021)  
Cornick, Jenna (2021)  
Frelund, Sue (2021)  
Hardy, Nora (2021)  
Ingersoll, Shirley (2021)  
Leaman, Jay (2021)  
Papouchis, Ann (2021)  
Scuffham, Deb (2021)  
Smythe, Chris (2021)

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### Eucharistic Minister (cont.)

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**Mason City, St. John's (cont.)**

Stanton, Deb (2021)  
Stanton, James (2021)  
Stevens, Kim (2021)  
Stone, Susan (2021)  
Willeke, Linda (2021)

**Mount Pleasant, St. Michael's**

Danielson, Cyndy (2021)  
Messell, Jerri (2021)  
Miyoshi, Carmen (2021)  
Swailles, Madeline (2021)

**Muscatine, Trinity**

Allison, Carol (2020)  
Atkins, Sandy (2020)  
Blake, Bob (2020)  
Haller, Raven Skye (2020)

**Muscatine, Trinity (cont.)**

Henneman, Karen (2020)  
Page, Jerry (2020)  
Phillips, David (2020)  
Sammons, Jim (2020)  
Urban, Misty (2020)  
Wilson, Diana (2020)

**Ottumwa, Trinity**

Jackson, Jim (2021)  
Krieger, Don (2021)  
Logan, Carol (2021)  
Neis, Mary (2021)  
Shafer, Marta (2021)

**Perry, St. Martin's**

Thompson, Wendy (2020)

**Sioux City, St. Paul's Indian Mission**

Huss, Roberta (2020)  
Thomas, Gloria (2020)  
White, Jim (2020)

**Webster City, Good Shepherd**

Flowerday, Barbara (2019)  
Katschke, Robbie (2019)  
Leksell, Deb (2019)  
Martin-Schwarze, Angie (2019)  
Mason, Karen (2019)  
Mason, Richard (2019)  
Masser, Rhonda (2019)  
McLaughlin, Judy (2019)  
Ubben, Kelly (2019)

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### Extraordinary Eucharistic Minister

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**Fort Dodge, St. Mark's**

Bacon, Anna (2021)  
Bacon, Art (2021)  
Daniel, John (2021)  
Ely, Shannon (2021)  
Rice, Celeste (2021)  
Vogel, Sharon (2021)  
Zhai, Jennifer (2021)

**Ottumwa, Trinity**

Brown, Su (2021)  
Krieger, Don (2021)  
Logan, Carol (2021)  
Neis, Mary (2021)  
Shafer, Marta (2021)

**Sioux City, St. Paul's Indian Mission**

Huss, Roberta (2021)  
Thomas, Gloria (2021)  
White, Jim (2021)

**Webster City, Good Shepherd**

Anderson, Marsha (2021)

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### Eucharistic Visitor

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**Algona, St. Thomas'**

Anderson, David (2020)  
Anderson, Pat (2020)  
Curry, Ormond (2020)  
Gilmore, Jeff (2020)  
Goecke, Barb (2020)  
Kortenber, Kelly (2020)  
Renshaw, Nettie (2020)  
Simonson, Pamela (2020)

**Cedar Rapids, Grace**

Wunschel, Wayne (2019)

**Clinton, Christ Church**

Brown, Carolyn (2019)

**Davenport, Trinity Cathedral**

Beck, Arlen (2020)  
Beck, Carolyn (2020)  
Burrough, Sue (2020)  
Burrough, Donald (2020)  
Chaney, Kelly (2020)  
Curtis, Lynn (2020)  
Franklin, Margery (2020)  
Green, Ann (2020)  
Hoffman, Keith (2020)  
Hogg, Mary (2020)  
Macalister, Helen (2020)

Ohnemus, James (2020)

Ohnemus, Pamela (2020)

Parry, Jan (2020)

Sidney, Jeanne (2020)

Smith, Esther (2020)

**Denison, Trinity**

Block, Carol (2021)

**Des Moines, St. Paul's Cathedral**

Doherty, Jan (2021)

Gentsch, Sharon (2021)

Seel, Nancy (2021)

Thompson, Shelley (2021)

Thompson, Tom (2021)

Weisenborn, Kimela (2021)

**Harlan, St. Paul's**

Schulte, Thomas (2019)

**Independence, St. James'**

Stahl, Wanda (2019)

**Iowa City, Trinity**

Clothier, Elizabeth (2020)

Cox, Charles (2020)

Hempel, Douglas (2020)

Lloyd-Jones, Jean (2020)

Piltingsrud, Janiece (2020)

Soucek, Mary (2020)

Tanner, Anne (2020)

**Mason City, St. John's**

Hardy, Nora (2021)

Leaman, Jay (2021)

Papouchis, Ann (2021)

Smythe, Chris (2021)

Stone, Susan (2021)

**Ottumwa, Trinity**

Brown, Su (2021)

Logan, Carol (2021)

Neis, Mary (2021)

Shafer, Marta (2021)

**Sioux City, St. Paul's Indian Mission**

Huss, Roberta (2020)

Thomas, Gloria (2020)

**Webster City, Good Shepherd**

Flowerday, Barbara (2019)

Katschke, Robbie (2019)

Leksell, Deb (2019)

Martin-Schwarze, Angie (2019)

Mason, Karen (2019)

Mason, Richard (2019)

Masser, Rhonda (2019)

McLaughlin, Judy (2019)

Ubben, Kelly (2019)

**Preacher**

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<b>Algona, St. Thomas'</b> Curry, Ormond (2020) Gilmore, Jeff (2020) Goecke, Barb (2020) Long, Mary (2020)	<b>Emmetsburg, Trinity</b> Nixon, Dave (2019) Nixon, Judy (2019) <b>Independence, St. James'</b> Stahl, Wanda (2019)	<b>Iowa Falls, St. Matthew's</b> Hansen, David (2019) Meyer, Larry (2019) <b>Mason City, St. John's</b> Paxon, Rich (2021)
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**Catechist**

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<b>Algona, St. Thomas'</b> Curry, Ormond (2020) Long, Mary (2020)	<b>Independence, St. James'</b> Stahl, Wanda (2019) <b>Iowa City, Trinity</b> Wong-Gibbons, Donna (2020)	<b>Webster City, Good Shepherd</b> Bucknam, Larry (2019)
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**Pastoral Leader**

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<b>Algona, St. Thomas'</b> Curry, Ormond (2020) Long, Mary (2020)	<b>Emmetsburg, Trinity</b> Flynn, Melanie (2019) Gress, Bob (2019) Gress, Sue (2019)	<b>Emmetsburg, Trinity (cont.)</b> Nixon, David (2019) Nixon, Judy (2019)
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**BISHOP'S DISCRETIONARY FUND - 2018**  
The Re. Rev. Alan Scarfe, Bishop of Iowa

**Receipts:**

Investment Income:	\$ 2,856.31	
Visitations and Gifts:	6,758.06	
Gifts	<u>2,850.00</u>	
Total Receipts		\$ 12,464.37

**Total Disbursements:** \$ 14,963.85

Province VI

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**Province VI**

**Ellen Bruckner, Province VI Coordinator**

In May of 2019, Province VI gathered people from each diocese for a visioning/direction setting session in Minneapolis. All eight dioceses were represented in the conversation. After spending time looking at resources and how the province can help the dioceses in ministry, it has been recommended that Province VI consider employing a part time communications person. Many people in the province do not know the purpose or activity of the province and how a province might be able to help a diocese in its ministry. Province VI may need to grow the networks by seeking people in the dioceses who participate in like ministries and finding ways of connecting these people across diocesan lines for sharing and supporting their shared ministries. The focus will be developing the communication strategy for the Province.

Six of our eight dioceses have experienced or are experiencing a transition in the episcopate in 2019. This creates some "wait" time for the Province since it takes a while for a new bishop to transition into the diocese and then begin thinking about a wider view, including the ways of collaborating in the province. There may be some changes in the way Province VI operates in 2020 due to these transitions.

# The Episcopal Corporation of the Diocese of Iowa

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## Disciplinary Board The Rt. Rev. Alan Scarfe

The Disciplinary Board president and Church Attorney were consulted in the process which resulted in an Accord, temporarily suspending priest Curtis Moermond, through mid-July 2019.

## Standing Committee—Official Actions August 2018 to August 2019 The Rev. Elizabeth Duff-Popplewell, Standing Committee President

These are the actions taken by the Standing Committee of the Episcopal Diocese of Iowa during the time period of August 2018 and August 2019:

**Ordinations were approved** for Nicola Bowler (transitional diaconate); and James “Jake” Andrews III (presbyteral) to be ordained in the Diocese of Spokane on behalf of Iowa on November 20, 2018.

**Candidacy was approved** for Elizabeth Gillman, Stephanie Jones, and Jennifer Latham on April 6, 2019.

**Consent to Ordination to the Priesthood** was given to The Rev. Zebulun Treloar and The Rev. Nicola Bowler on April 6, 2019.

**Real estate sale and orderly transfer of ministry** at Trinity, Denison, was approved on December 19, 2018.

**At Trinity, Iowa City**, consent was given to rent a small strip of land to the City of Iowa City for a period of time not to exceed one year. Consent was also given for the sale of a parcel of land to the City of Iowa City for construction purposes on December 19, 2018.

**On April 5, 2019**, the Standing Committee consented to the sale of an Easement between Trinity, Muscatine, and the building east of the church.

**On July 7, 2019**, consent was given to accept the offer for the sale of All Angels', Red Oak.

### **During this time, the Standing Committee gave consent to the Episcopal Elections of:**

The Rev. Mark. D. W. Edington, Convocation of Episcopal Churches in Europe, December 19, 2018

The Rev. Jennifer Anne Reddall, Diocese of Arizona, December 19, 2018

The Rev. Kimberly (Kym) Lucas, The Episcopal Church in Colorado, December 19, 2018

The Rev. Phoebe Roaf, Diocese of West Tennessee, January 29, 2019

The Rev. Canon Kathryn McRossen Ryan, Bishop Suffragan, Diocese of Texas on March 26, 2019

The Rev. Canon Megan Traquair, Diocese of Northern California, April 9, 2019

The Rev. Thomas James Brown, Diocese of Maine, April 9, 2019

The Rev. Canon Susan Brown Snook, Diocese of San Diego, April 9, 2019

The Rev. Dr. Shannon MacVean-Brown, Diocese of Vermont, June 4, 2019

The Rev. Jonathan H. Golts, Diocese of South Dakota, June 4, 2019

The Rev. Lucinda Ashby, Diocese of El Camino Real, June 19, 2019

The Rev. Dr. Bonnie Perry, Diocese of Michigan, June 20, 2019

## Board of Directors of the Episcopal Corporation of the Diocese of Iowa

### Summary of Official Actions of the Board of Directors

September 15, 2019 – June 14, 2019

The Rev. Dr. Judith Crossett, Secretary of the Board

### September 15, 2018

#### **Memorial Resolution: The Rev. Donald G. Twentyman, Jr, 1941-2018**

WHEREAS The Rev. Donald G. Twentyman Jr. served as a Deacon in God's One, Holy, Catholic and Apostolic Church for over 30 years, and blessed the Diocese of Iowa and St. Alban's in Spirit Lake for 17 of those years after migrating south from the Diocese of Minnesota; and WHEREAS he purposefully lived and exemplified his vocation as a Kinship mentor and Board member, County Ministerial member and Treasurer, backup Hospital Chaplain, Bible study

leader, Advocate for Youth Literacy, Community Volunteer, Resident Computer Genius and all-around Encyclopedic Resource; and

WHEREAS he dutifully participated in various Diocesan committees, forums, dialogues, small groups and retreats; and

WHEREAS he faithfully served his country in the United States Army; and

WHEREAS this devoted servant, husband, father, grandfather and friend entered the Church Expectant on 12 April 2018, peacefully awaiting resurrection into the Church Triumphant;

BE IT THEREFORE RESOLVED that the Board of Directors of the Diocese of Iowa commends him joyfully into the nearer presence of our Lord, Jesus Christ; gives thanks for his life and witness among us; and extends our prayers and sympathy to his wife Mary, and to his family.

Submitted by The Rev. Carl Mann

**Memorial Resolution: The Reverend Canon Arthur P. Becker, 1928-2018**

WHEREAS the Reverend Canon Arthur P. Becker entered into Eternal Life on June 22, 2018; and WHEREAS he served the Episcopal Church as a priest for 62 years, having been ordained in December of 1956; and

WHEREAS he became canonically resident in the Diocese of Iowa in 1961, serving as Rector of St. Michael's Church in Mount Pleasant from 1961 to 1970, also serving briefly as Priest-in-Charge at St. Peter's in Fairfield; and

WHEREAS he served at Calvary Church in Sioux City from 1970 to 1974, first as Priest-in Charge and then as the first Rector of the parish, also serving briefly as Priest-in-Charge at St. George's Church in LeMars; and

WHEREAS he served the Episcopal Diocese of Iowa on Bishop Righter's staff from 1974 to 1988; and

WHEREAS in that position he served as Christian Education Consultant, as Resource to the Episcopal Center of Camps and Conferences, and as Consultant to Bishop with a broad portfolio for evangelism and adult formation; and

WHEREAS he served as the Church Deployment Officer from 1984 – 1991; and

WHEREAS he finished his active ministry as Rector of St. John's Church in Clinton from 1988 to 1994; and

WHEREAS during his ministry in Iowa he served in various capacities on committees and commissions of the diocese, as well as in various capacities in the broader church; and

WHEREAS he was known for his ironic sense of humor, his compassion and his broad intellectual and scholarly interests; and

WHEREAS after his retirement in 1994, he continued to serve in various supply positions in eastern Iowa, and after moving to Minnesota in 1999, continued to serve as a supply priest;

BE IT THEREFORE RESOLVED that the Board of Directors of the Episcopal Diocese of Iowa gives abundant thanks to God for the gifts and ministries of this faithful servant; and extends its sympathy and thanks to his wife Lois, and to their children, David, Michael and Susan, and to their families; and

BE IT FURTHER RESOLVED, that this resolution be affirmed by the Annual Convention for 2018.

Submitted by, The Rev. Canon Kathleen S. Milligan

**Memorial Resolution: The Reverend Canon Alexander A. Aiton, 1949-2018**

WHEREAS The Reverend Canon Alexander Anthony Aiton entered into eternal life on July 30, 2018; and

WHEREAS s he was born and raised in New Jersey and received academic degrees from City University of New York, the General Theological Seminary and Drew University; and

WHEREAS he was ordained in the Diocese of New Jersey and served three different church families there before joining the Diocesan staff of the Diocese of Central Pennsylvania; and

WHEREAS he came to the Diocese of Iowa in 1991 and served as Rector of the Episcopal Parish of Ames for the next 27 years until his retirement on December 31, 2017; and

WHEREAS he has served as a member and as chair of the Standing Committee, the Commission on Ministry, and the Stewardship Commission, and as a member of several other committees in the Diocese and in the community of Ames; and

WHEREAS while serving the Diocese of Central Pennsylvania he became an honorary canon of St. Stephen's Cathedral in Harrisburg, PA, and at its 164th Convention the Diocese of Iowa named him an honorary canon of Trinity Cathedral, Davenport; and  
WHEREAS Father Al is missed by his parishioners, friends, and colleagues, and Punky is missed by his daughters, Becci, Grace, and Joy, former wife Joan, and six grandchildren;  
BE IT THEREFORE RESOLVED that the Diocese of Iowa gives thanks to God for his faithful witness and ministry among us, and prays God's blessings for his continued growth in the love and presence of his God; and

BE IT FURTHER RESOLVED that the Diocese of Iowa extends its sympathy to his family.  
Submitted by Mr. David Oakland, St John's by the Campus, Ames

**Courtesy Resolution Departing Board Members September, 15, 2018**

WHEREAS all good members of the Board of Directors/Diocesan Council of the Diocese of Iowa eventually come to the end of their terms; and  
WHEREAS at-large directors Kent Anderson (Board Vice President), and Tyler Schleicher; and Chapter Representatives Alescha Caldwell (East), Tracy Henry (West), Ruth Ratliff (Chaplain – North Cedar Valley) and Kelly Shields (Southeast) have now completed their service; and  
WHEREAS at-large director Amy Mellies will take a staff position and will be leaving the Board;  
BE IT THEREFORE RESOLVED that the Board of Directors of the Episcopal Diocese of Iowa recognizes their contributions, gives thanks for their faithful service over these last years, looks forward to their ongoing ministry within the Diocese; and finally, wishes them Godspeed.

Submitted by Kathleen Milligan

**The above Memorial and Courtesy Resolutions** were affirmed by the Board of Directors and were received by the 166th Annual Convention of the Episcopal Diocese of Iowa meeting in Des Moines, October 27-28, 2018.

**Approved** the disbursement of \$20,000 from the New Initiatives sources for the beginning of a new storefront ministry in Spencer, Iowa. This will be funded through St. Alban's in Spirit Lake, with the presence of the Rev. Beth Preston, newly ordained to the priesthood.

**Approved** the immediate release of funds as recommended by the One World One Church Commission, two of which were for Nzara and one for Swaziland. Others respond to needs in Ghana and Ethiopia.

**Approved** signing a contract with Central College in Pella, IA to hold the Annual Board Retreat there on November 9-10, 2019.

**Resolved**, that the Diocese of Iowa shall offer four Episcopal Health Plans for 2019: Anthem BlueCross Blue Shield PPO 80, PPO 80 MSP, CDHP 15, CDHP20; all with Cigna Basic Dental. The Cigna Dental and Orthodontia plan shall also be an available option. The 2019 rates shall be based on 3 tiers to include Single, Plus One and Family Coverage. The HRA shall be discontinued for 2019. The HSA employer contributions shall be adjusted for a total annual cost for each plan package of \$10,104 single, \$18,180 plus one, and \$28,284 for family. The default replacement plans for the discontinued PPO 75/50 and PPO 75/50 MSP plans shall be the PPO 80 and PPO 80 MSP plans. Motion passed.

**Moved** to accept the proposal for the diocesan audit from Meriwether Wilson & Company, passed.

**Received** reports from the Insurance Task Force and the Clergy Compensation Task Force with no action at this time.

**Moved** to forward the amended budget proposal for 2019 to Diocesan Convention; passed.

**Approved** International Development Mini-Grants for distribution by the Executive Committee:

- \$5000 Neighborhood Care Point Feeding Program, Swaziland
- \$3100 Five-day Leaders' Workshop for the Mothers' Union, Nzara
- \$3200 Training for School Teachers and Midwives, Nzara
- \$2000 Growing Healthy Food (Self-Help Int'l and Self-Help Ghana)
- \$2835 Towards printing Children's Bibles in Oromifa language, Ethiopia

It was noted that the first two were funded by anonymous gifts; the diocesan budget amount of \$8035 was divided among the others. The amount is 0.07% of our total 2018 budget.

Type equation here. November 9-10, 2018: Annual Meeting and Board Retreat

The following officers were elected by acclamation:

President: The Rt. Rev. Alan Scarfe

Vice President: The Rev. Kathleen Milligan

Treasurer: Mr. William Smith

Secretary: The Rev. Judith Crossett

Proposed meeting dates are as follows for the year;

2019 Executive Committee proposed meeting dates Agenda planning		Proposed Board meeting dates
Wednesday, December 19	See 12/19/18, incl agenda	January 26, 10:30 am
Racial Awareness		To be announced
Wednesday, March 20	See 5/22/19, incl agenda	April 6, 12:30
Wednesday, May 22	Wed, July 24	Friday, June 14, 10 am, Grinnell
Wednesday, August 21	See 10/16/19, incl agenda	September 14, 10:30, Old Brick, Iowa City
Diocesan Convention		October 26-27 (nb, Sat-Sun)
Wednesday, October 16	Wednesday, December 18	November 15-16, 5:00 pm

**Resolved**, that \$20,000 be granted to the Way Station to continue that program through July 2019, and \$12,000 to St. Mark's, Des Moines, to continue Messy Church through November 2019. From the New Mission Development Fund. Passed.

**Approved** a motion for the following 2019 Housing Allowances:

The Rt. Rev. Alan Scarfe	\$42,000
The Rev. Dr. Marilyn van Duffelen	\$18,000
The Rev. Meg Wagner	\$24,000

**Approved** that the Executive Committee is authorized to adopt an investment policy consistent with the Foundation Fund policy and, if it deems appropriate, to finalize transfer to management by RBC.

December 19, 2019 Executive Committee

**Moved** to adopt the Investment Policy as presented; passed unanimously. Discussion was held on the choice of investment manager. The consensus of the Executive Committee is that there is no need to have the change completed on or by January 1, 2019.

**Moved** that Living Stones and Collaborative Ministries be added to the list of approved recipients of designated donations. Motion passed.

**Clarified** that the President of the Standing Committee is a voting member of the Executive Committee.

January 26, 2019: Executive Committee held via ZOOM

Heard a report from the Rev. Meg Wagner on the Fresh Expressions conference she attended in London and a review of New Initiatives in Iowa.

**Resolved**, that that unspent 2018 budget funds for Diocesan House Maintenance, Publishing Journal & Report Booklet, and Collaborative Ministry Partnerships (Living Stones) be moved to reserve lines for those funds. Passed.

**Resolved**, that management of the Iowa Diocesan Episcopate Fund be moved to Mr. Michael Greth at RBC Wealth Management. Passed.

**Reviewed** policy on receipt of major gifts; no change is needed.

**Resolved**, that the Bishop and Standing Committee having consented, the Executive Committee of the Diocese may take final action on the sale of the property of Trinity Episcopal Church, Denison, Iowa.



**Resolved**, that the fall Annual Meeting and Board of Directors Retreat be held November 22-23, 2019, at Prairiewoods Retreat Center in Hiawatha, IA.

March 20, 2019 Executive Committee

**Approved** revision of the 2019 budget to increase our diocesan assessment to bring it in line with asking.

**Approved** a Promissory Note between Hannah Cornthwaite and the diocese (from the Bishop's Clergy Assistance Fund).

April 6, 2019 Board of Directors

**Moved**, that the amounts available as grants from the GILEAD campaign each year will be up to 25% of the total received; the remaining 75% will be invested over the longer term. Passed.

Financial Updates: we have \$18,000 more received than expected; income exceeded expenses by \$29,000 (approximate).

**Moved and passed** to accept the recommendation from Ways and Means that those monies be moved as follows:

The unexpended portion of their 2018 budget to One World One Church. The remainder divided: 20% to Lambeth Travel; 20% to General Convention Reserve for Deputies' expenses; 20% to Equipment Reserve for diocesan staff computer replacement; the remainder to reserve for maintenance and repair of the diocesan office (Mills House).

**Moved** to sign the contract with the Des Moines Marriott for the 2021 Diocesan Convention (dates set aside are October 28, 29, 30). Passed.

Appointments to the Youth Ministry Development Team were announced: Youth: Sharon Freeman, Ames; Sedona Helmke, North Liberty; Maire Powell, Clermont; Lay adults: Jeff Cornforth, Waverly; Tiffany Farrell, Waterloo; Abby Haggerty, Council Bluffs; Kristine Kofoot, Cedar Falls; Kevin Saunders, West Des Moines; Clergy: Wendy Abrahamson, Grinnell; Tom Early, Spirit Lake; John Greve, North Liberty/Cedar Rapids.

May 22, 2019 Executive Committee

**Approved** a request from Agape Café, Iowa City, to withdraw \$6,000 of their funds for the Café's share of a planned kitchen renovation at Old Brick.

**Announced** the appointment of Michael Last, retired ELCA bishop, as Transitions Officer, to be a half-time appointment.

**Approved** a grant of \$20,000 to the Way Station (subject to availability of funds) for the time period August 2019-February 2020; they are hopeful that they will be awarded a grant to begin after that.

June 14, 2019, Board of Directors

**Moved** to accept the audit reports with changes noted; motion passed. The diocese is in good shape with substantial liquidity and the opinions for both the Diocese and the Foundation are "unqualified", that is, the highest rating.

Two motions for the New Initiatives fund were passed:

**Resolved**, that the Board of Directors recognizes The Way Station, located in Spencer, IA, as a New Initiative Ministry of the Episcopal Diocese of Iowa (formerly associated with St. Alban's Episcopal Church in Spirit Lake), effective June 1, 2019 for oversight and support of the ministry and finances.

**Resolved**, that \$10,000 is hereby designated to be the annual housing allowance for The Rev. Elizabeth Preston effective June 1, 2019.

**On news that Iowa Religious Media Services is closing**, it was moved and unanimously passed that the Board of Directors of the Episcopal Diocese of Iowa express appreciation to Iowa Religious Media Services for their service and work over the years.

**Moved and passed** to approve the draft budget for discussion by chapters, vestries, and individuals.

**Appointments announced:**

Transitions: Bishop Last (retired ELCA Bishop), also to assist with congregational development.

Old Brick Board: Kathleen Milligan, Board liaison; Julia Mears (New Song), Bryan Franzoni (community).

YMDT: Grace Fleming, Cedar Rapids to replace Maire Powell, Clermont

Ways and Means: Fred Steinbach

OWOC: Kathleen Milligan

#### **Convention update and committees:**

Shane Claiborne will speak, spend time with youth and young adults; Bishop Scarfe plans private conversation with Shane regarding some of his views on marriage and how that topic might be addressed at Convention, if it is brought up.

Nominations Committee: Raisin Horn, chair; Kathleen Milligan and Tom Early

Dispatch of Business: Jean McCarthy

Resolutions Committee: still in need of a chairperson

Members of Diocesan Advisory Group and a Community Advisory Group for the Beloved Community Initiative were announced.

**St. Paul's Indian Mission** reports receiving a grant from the Society for the Propagation of the Gospel for renewing meeting space, which is much appreciated; they have need of additional renovations and are seeking funds.

## Commissions and Committees of the Board of Directors:

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### COMMISSION ON JUSTICE, PEACE AND INTEGRITY OF CREATION

#### **Chemical Dependency Committee**

**Ms. Patti Christensen, Chair**

The Diocesan Chemical Dependency Program maintains a network of both laity and clergy who are ready and willing to assist local churches in pastoral care to those with substance abuse issues and those who love them.

We continue to sponsor semiannual "Pathways to Serenity" retreats each spring and fall which focus on the 12-steps as articulated by Alcoholics Anonymous. In 2019 we celebrate 35 years of sharing God's love via Pathways Retreats and this year's fall retreat is the 67<sup>th</sup> one. We see the Spirit of God working evangelistically in the lives of those attending through the love, hope, and acceptance this church offers at these retreats - often to unchurched, or people of other denominations.

There are some scholarships available via the "Friends of Pathways" Fund (which accepts donations) because we do not want insufficient financial resources to keep anyone away from Pathways Retreats. The cost of the Pathways Retreat is currently \$80.00 per person.

Contact us for help with substance abusers and their family and friends. We can be reached by:

- (1) Phone or FAX the Diocesan Office 515-277-6165 or confidential FAX line: 515-277-0106, where the Bishop's Administrative Assistant [jallaway@iowaepiscopal.org](mailto:jallaway@iowaepiscopal.org) will contact a Task Force member in your vicinity.
- (2) Direct contact with Task Force members either through Chairperson, Patti Christensen (West Des Moines), 515-223-5083, [nanapatti@mchsi.com](mailto:nanapatti@mchsi.com), or other Task Force members: Doug Kinman (Des Moines); Melissa Torres (Des Moines), 515-277-3761; Barry Wilson (Mason City), 641-424-2273

Diocesan policy prohibits any recriminations upon those seeking help with chemical dependency. All callers may/will remain anonymous. We thank God and the Episcopal Church for giving us a beautiful way to help share love and healing from substance abuse.

**Creation Care Ministry**  
**Jenn Latham**

The Creation Care Ministry includes the completion of projects that were funded by the national church's Creation Stewards grants.

In Grinnell at St. Paul's, the postage stamp prairie has been planted and is becoming established. In addition to the planting of native species, the project also included installation of permeable pavers to help slow down and reduce the amount of storm runoff from rooftops and concrete into storm drains. Educational signage has also been placed by the sidewalk which explains the prairie and pavers' role in protecting the Little Bear Creek watershed. The space is available for educational visits to help show community members how urban areas can also implement practices that help our local environment. Situated in the midst of the prairie, the pavers and new benches also provide a space for quiet contemplation and prayer.

At Trinity in Emmetsburg, the Prayer Garden has provided a harvest of wildflowers and "prayers." Within the first year, the wildflowers were blooming around the Celtic Cross that was landscaped into the soil. A bench invites passers-by to take a break and rest, reflect and pray. A wooden prayer box labeled as such is opened weekly and prayers are honored during the weekly Eucharist. Recently photos were taken of a wedding party that had chosen to record the date/event. The photographer said the Trinity Prayer Garden is used frequently for such occasions even by those not being married at Trinity. The garden is tended by Trinity volunteers and a permanent sign describes the various wildflowers seen in the garden. Recently, the Celtic Cross provided a venue for Trinity's 140th-anniversary reception which included cake and beverages for members of the community who wanted to honor the occasion. Community members frequently comment on how the garden setting and the flowers have improved the esthetics of the vacant lot which heretofore had been an unattractive nuisance, especially on a windy day.

This year we hope to develop a Care for Creation formation program to be shared with churches who would like to use it, and we plan to be involved in advocacy at the state level for legislation that supports protecting our waterways and environment.

***"Faith in Action" and Diocese of Iowa Lobbyist***  
**The Rev. Wendy Abrahamson**

At the completion of the third year of "Faith in Action" our ministry continued along the same path as in previous years. The Facebook group did a good job of keeping Iowa Episcopalians informed on legislation in the Iowa General Assembly, advocacy issues of importance to people of faith, and various gatherings such as "Lights for Liberty" a national gathering of support asking for humane treatment of those taken by ICE and being held in US detention centers.

Our third annual *Episcopalians on the Hill* day brought nice group of Episcopalians to the Iowa Statehouse, where we met with Sen. Rob Hogg and Rep. Bob Kressig and then went to speak with our own members of the Iowa General Assembly on bills the Diocese of Iowa registered support or opposition for. Concluding the day we debriefed with ideas for improving this work, such as having a pre-gathering meeting for people to learn more about bills before coming to the Statehouse.

The registered lobbyist, The Rev. Wendy K. Abrahamson, followed specific topics in consultation with Bishop Scarfe, all in keeping with the mind of General Convention and the Diocese of Iowa. She also attended Ecumenical Advocacy Days in Washington DC and took workshops on lobbying, culminating in opportunities to lobby members of the US Congress.

For the upcoming year "Faith in Action" will work to expand and improve *Episcopalians on the Hill*, and work to build a small lobbying team for the Diocese.

**Prison Ministry**  
**The Rev. Anne Williams**

The Episcopal Diocese of Iowa has numerous locations where ministry to those affected by incarceration is carried out. There are individuals and groups in all areas of the Diocese to whom this ministry is vital. Some are visiting our state and local prisons and jails while others are engaged in restorative justice ministries and ministries to the victims of crime and the families of the incarcerated and in ministries that hope to intervene in the poverty-crime cycle.

There are Episcopalians engaged in active prison ministry in at least eight areas of the Diocese – in the Linn County Jail (Maridee Dugger), Blackhawk County Jail and Jeremiah House in Waterloo (Chuck Lane), Mitchellville Women's Correctional Facility (Carol Kramer and Jeannie Smith), Davenport (Larry Thomas), Anamosa State Penitentiary (Anne Williams), and Richard Winemiller (Iowa Medical Correctional Center at Oakdale). In addition, there are many others who provide on-going religious support to the incarcerated who are members of their individual congregations.

At Anamosa State Penitentiary, there is an EfM (Education for Ministry) group that is starting its sixteenth year, has impacted seventy-four men, and graduated twenty-one. This fall, seven new men are joining the group, one is returning to resume his work after taking a break from the program, and four are in mid-program.

**MULTICULTURAL COMMISSION**

**Beloved Community Initiative**

**The Rev.'s Meg Wagner and Susanne Watson Epting, Co-Founders**

**Lisa Covington, Program Coordinator**

The young African American woman stood confidently before a crowd of over 200 to introduce Dr. Jeanette Epps, one of two African American astronauts with NASA. "I had the privilege of meeting Dr. Epps a few years ago," she said. "Dr. Epps gave me good advice about what courses to take, including some Russian language. I did what she suggested, and today I am an engineer at Collins Aerospace."

The crowd erupted spontaneously, springing to their feet to affirm both Dr. Epps and the young woman who is following her dream.

It's a little different way of being church—and yet with the ongoing assistance of a Genesis grant from The Episcopal Church, we continue our mission toward racial justice, healing and reconciliation. On behalf of the Diocese of Iowa, the Beloved Community Initiative continues to serve as a resource for dismantling racism both in our own churches, as well as in the local community.

In February, the co-sponsorship of a program to bring Dr. Epps to Iowa City was representative of so much of what we do. Working with the Iowa City School District, Fastrac (a program to help teens overcome barriers to their education), and FilmScene, we hosted over 200 people at a soul food dinner and movie screening of "Hidden Figures."

In March, we worked with Iowa Mennonite School and many community partners, as we hosted high school students for a week-long immersion program. Students met and learned from a member of the Meskwaki Tribal Council, the local Rabbi, a community of Sudanese immigrants, and others. They stayed overnight at Old Brick, had the opportunity to volunteer at the Agape Café, and participated in a workshop with Jamel Nelson on envisioning and creating equitable communities.

The same month, we hosted over 50 people of faith as they explored with Dr. Jennifer Harvey, "Which Way to Justice? Dismantling Racism as a Spiritual Practice." It is our hope that, over time, more and more people of faith will realize that this work toward racial justice is life-long work.

It has been a joy to welcome Lisa Covington, with the help of an Episcopal Church United Thank Offering grant, as our program coordinator this year. With her connections to both the University of Iowa and the community, she has introduced and incorporated new people into our work. She has also participated in working with our diocesan trainers and has done some consulting around a civil rights pilgrimage. In fact, the Beloved Community Initiative hosted a pilgrimage to an Underground

Railroad site during Palm Sunday weekend. Participants were able to reflect theologically on this history and consider the meaning of risk-taking then and now.

Lisa also connected us with The AfroHouse at the University of Iowa and the Black Leadership Institute. In May, over 200 people came to celebrate the annual graduation ceremony specifically for African American students at The University of Iowa. The AfroHouse, the Black Leadership Institute and Beloved Community Initiative planned and hosted the celebration of the 2019 graduates. Graduation ceremonies for students of color at predominantly white institutions allow students to be able to hold space as a community without judgement or micro-aggressions from a campus community that is often isolating.

Space prohibits a full discussion of all the events and relationships that have taken place over this last year, but additional highlights include:

- Offering dinner and fellowship called "Soul Tending for Change-Makers"
- Regular hosting of the Johnson County Interfaith Coalition and Native American AA group
- Periodic hosting of other meditation and community planning groups
- Ongoing training for Episcopal Diocese of Iowa congregations in dismantling racism
- Co-hosting (with Moms Demand Action for Gun Sense in America) a "Humanize my Hoodie" training for white allies and accomplices

In addition, our thoughts have turned toward sustainability, and especially bringing additional people into our work in a systematic way. Two new advisory groups have been established, one a diocesan group, and the other a community group. We're excited at the new ideas and energy that are being generated, including exploring what Beloved Community might look like behind prison walls, and establishing a reading camp or camps to work toward improving literacy rates. We'll also explore the idea of a regular worship community and an interfaith book group.

We are grateful to the people of the Diocese of Iowa for supporting our work, and for the ongoing commitment to work toward racial justice, healing and reconciliation.

Thanks, too, to our Advisory Council Members:

Diocesan: The Rev. Kim Turner-Baker, Ms. Ellen Bruckner, Ms. Donna Wong-Gibbons, Ms. Aileen Chang Matus, Ms. Donna Prime, The Rev. Ruth Ratliff, The Rev. Melody Rockwell, Dr. John Stewart

Community: Mr. Dawson Davenport, Ms. LaTasha DeLoach, Ms. RaQuishia Harrington, Ms. Amy Kraber, Ms. Karen Nichols, The Rev. Anthony Smith, Ms. Barb Stanerson, The Rev. Jane Stewart, Ms. Gabriella Tobias

**St. Paul's Indian Mission, Sioux City, Iowa**  
**The Rev. Dr. Marilyn van Duffelen, Vicar**

As of the writing of this report, St. Paul's Indian Mission continues on budget. We received a clean independent audit, as we did last year. All financial transactions were imported from Quicken into a new software program, QuickBooks, so that it is consistent with the Diocesan financial software. Last year we received a further \$3000.00 grant from the Society for the Propagation of the Gospel to Indians and other peoples. This allowed us to complete the installation of new carpeting in the Sunday School room and the priest's office. This year, we have received a further \$5000.00 grant from the same Society, which will be used to replace all the lighting in the basement and hallways with LED fixtures. It will also be used to refurbish the two toilets with new fixtures. We are very grateful for the Society's continued support of St. Paul's Indian Mission.

The healing and reconciliation between the Omaha people and St. Paul's Indian Mission continues. On two occasions, a young Omaha man sang a "Thank you" song in his language and accompanied himself with our hand drum. Both of these occasions were baptisms. This participation of Omaha people is a new event in the history of this mission. It was preceded by the funeral of Carol Buffalo Chief, an Omaha woman, at St. Paul's, which was the first Omaha funeral in its history. We are grateful to observe this continued engagement of the Omaha people with St. Paul's Indian Mission.

Our Sunday Meal Outreach continues unabated, and the numbers of those served is slowly growing. RTF no longer provides people for community service as they have terminated that

program. We are still struggling to find members for building maintenance. We continue to offer personal hygiene articles and clothing to those in need, with the support of donations from other churches.

This year St. Paul's participated in an interstate activism event. For the past five years, the Sacred Horse Society has engaged in a ten day ride to honor the suffering and death of native women and children due to the mass relocations of native peoples following the hanging of the 38 + 2. This year the ride organizers asked Sto-wahi' quilting guild to create a hand-made quilt depicting the women and children being honored and remembered. Members of the church are members of Sto-wahi' Quilting Guild, which meets weekly in South Sioux City NE and they participated in the quilt-making. Upon completion of the ride in Pierre, SD the quilt was presented to the State Legislature for display. A plaque will be created with the names of the quilters and the symbolism of the quilt, and it will be displayed in the State Legislature Building. The quilt-makers plan to attend the dedication.

I have reinstated Summer Bible School, with 4 attending the July program. I hope to repeat the program in August and segue into a Sunday School program in September, depending on the volunteer situation.

We are collaborating with the Department of Human Services, Native Division, to offer culturally appropriate educational movies one Saturday each month. This will continue for five occasions, at which time the success of the program will be assessed to determine its future. We are also making plans to collaborate on crafting workshops for children. At the current time, the church is open Tuesday evenings, and people gather to spend time crafting together. Examples are bead work, star quilt making, and ribbon skirt making. In cooperation with DHS, we hope to offer workshops for children to learn these crafts, taught by St. Paul members and also by members of the larger native community.

Finally, St. Paul's will be hosting Fatherhood is Sacred/Motherhood is Sacred sessions on Thursday evenings from August until December. They will be taught by Terry Medina and financed by DHS. This will engage more members of the larger native population with St. Paul's and provide opportunities for evangelism.

## **COMMISSION ON ONE WORLD, ONE CHURCH (OWOC)**

**David Oakland, Convener**

This has been an exciting year for the companion relationships. Bishop Andrew Swift is completing his first year as Bishop of Brechin; by the time our Convention is held The Rev. Stacey Gerhart will have returned from a three-month ministry in the Diocese of Swaziland; Bishop Samuel Peni is now Archbishop Samuel Peni—serving as Bishop of Yambio and Archbishop of Western Ecuatoria (which includes Nzara). With his move, the Diocese of Nzara has a new Bishop, Richard M. Aquilla. Bishop Aquilla plans to attend our Diocesan Convention.

Ray Gaebler's Nzara Companions report includes information about the Synod in Nzara, the visits that have occurred this year, and the various projects which are underway. Stacey Gerhart's Diocese of Swaziland report covers the many activities of that companion.

On September 30, six lowans (Bishop Alan and Donna Scarfe, Jerry Davenport, Amy Mellies, The Rev. Kathleen Milligan, and The Rev. Melody Rockwell) will meet Bishop Andrew Swift and Pat Millar from Brechin and Douglas Viets (a friend of Jerry's from their winter church in Florida) in Johannesburg for the drive to Eswatini. They will be present for their Diocesan Synod (convention) in early October. Melody, Jerry, Douglas, and Stacey Gerhart will stay for another week to be involved in projects there before returning home in mid-October.

Our Global Missioner, The Rev. Canon Suzanne Peterson, was unable to attend the Global Episcopal Mission Network (GEMN) Workshop. This is a workshop which has enriched the work of our Commission for many years and we continue to maintain our membership.

Ecumenical and Interfaith Officer, The Rev. Jean McCarthy, and The Rev. Zeb Treloar attended the National Workshop on Christian Unity. This is also an event that has contributed richly to our Commission life each year.

2019 International/Sustainable Development Mini-grants are awarded as follows:

Diocese of Swaziland – Expansion of the Piggery: \$3,500

Diocese of Nzara – Birthing Center Supplies: \$3,000

Diocese of Southeast Florida Episcopal Charities – emergency Hurricane Dorian relief funds for their companion Diocese of the Bahamas: \$1,658

The Dioceses of Brechin, Iowa, and Swaziland plan to gather young adults in Iowa in August 2020. Amy Mellies and Traci Petty of the Diocesan staff are working to organize that activity with an emphasis on environmental issues.

### **Companions of Nzara Ray Gaebler, coordinator**

#### **History**

In October of 2008, The Rev. Samuel Peni was a student at Wartburg Theological Seminary in Dubuque, Iowa. The curriculum required the January term be “an inter-cultural experience.” Most of his fellow students planned mission trips to Latin America or overseas. Samuel convinced the seminary that being in America, he was living an inter-cultural experience every day. One of his first activities was to increase his understanding of the Episcopal Church in America. He attended the 2008 Diocese of Iowa Convention with delegates from St. John's Church in Dubuque. During the Convention, he met The Rev. Mary Cole-Duvall and The Rev. Milton Cole-Duvall. They invited Rev. Samuel to serve a month's internship in the St. Timothy's Church Community in West Des Moines. Since 2008 there have been changes for both Rev. Samuel and the Diocese of Iowa. When Samuel returned to South Sudan after spring graduation, the new Diocese of Nzara was established. The Rt. Rev. Samuel Enosa Peni was installed as the first Bishop. By 2012 the growing Iowa/Nzara relationship was formalized as Companion Dioceses. This relationship was renewed for another five years in 2017.

#### **The Situation in South Sudan**

The situation in South Sudan is hopeful. On July 9, 2011 South Sudan celebrated independence from Sudan. In December 2013 civil war erupted. Since then several ceasefire and peace agreements were signed but none of them lasted. The present peace agreement was signed September 12, 2018. This time there is cautious optimism as parties to the agreement appear to have more regard and hope for a positive outcome. However, implementation of key provisions is substantially behind schedule. Some international leaders are concerned that the process may not hold.

#### **Mutual Visits**

Because the overall environment in Nzara has been relatively secure this year, Bishop Peni is comfortable inviting foreign visitors. Mutual visits help build trust and person-to-person relationships.

Bishop Peni came to our 2018 annual convention and participated in all activities. He had the opportunity to meet Presiding Bishop Curry and Bishop Epting and to congratulate Cathleen Bascom on her election as the new bishop of Kansas. He was able to greet Bishop Swift of Brechin.

Sadly, on Saturday during Convention, Bishop Peni was notified his lifelong friend, Bishop Peter Mundi, had died of cancer. Peter Mundi was Bishop of Yambio and Archbishop of the Internal Province of Western Equatoria. Bishop Peni cut short his visit to Iowa and hurried home to arrange for the funeral.

In February 2019, Bishop Scarfe, accompanied by The Rev. Mel Schlachter, Abigail Livingood and Marcy Luft, visited Nzara. (Abigail and Marcy are members of St. Timothy's.) A major highlight of the trip was the dedication of new school buildings built with the support of the United Thank Offering.

In March 2019, Bishop Peni was elected Bishop of Yambio and Archbishop of the Internal Province of Western Equatoria. The Province is composed of six separate Dioceses. The election was March 7th, the installation on March 10, 2019. During the transition, another good friend of Archbishop Samuel visited. The Rev. Milton Cole-Duvall is a Canon of All Saint's Episcopal Cathedral in Nzara. He participated in Bp. Samuel's last official service as bishop in Nzara on Palm Sunday and, also, on Easter Sunday at Bp. Peni's first official service in Yambio as the new bishop and Archbishop of Western Equatoria. In addition to his responsibilities for the Province and the Diocese of Yambio, Archbishop Peni continues to advise the Justice, Peace and Reconciliation Commission and participate in the National Dialogue.

Archbishop Peni returned to Iowa and was honored in May 2019 when Wartburg Seminary awarded him an honorary Doctor of Ministry Degree. During this visit he had the opportunity to attend an Iowa clergy conference and also visit with Bishop Cathleen Bascom to explore possibilities of establishing a Kansas/Yambio Companionship. We are blessed knowing this remarkable and faith-filled man. We wish him God's Blessing in his new work. He will always have a special place in our hearts.

### **Looking Ahead**

On August 11, 2019, the Rt. Rev. Richard Mbikoyesu Aquilla, was consecrated and enthroned as the second Bishop of Nzara. The Rev. Elizabeth Popplewell and her husband, Dennis Popplewell represented the Diocese of Iowa at the celebration. Bishop Richard previously served as Dean of All Saints Cathedral in Nzara.

In addition to prayers and exchange visits the companionship focuses together with the people of Nzara on their three priorities; Evangelism, Health and Education. Iowans support evangelism with "Soap and Salt." Clergy in Nzara, including the bishop, do not receive monetary compensation. Villagers help them with their family gardens and share some food from their own gardens. Each month the clergy gather in Nzara to report on the month's activities. They are given a ration of soap for hygiene and salt to flavor their food. Many Iowa parishes, even the smallest, have raised funds for this.

We also support Nzara priorities through Diocese of Iowa International Development Grants. In November a \$3100 grant was privately funded to support a week of retreat and training for the Mother's Union. The Mother's Union in Nzara is 1100 women strong and is a primary force for evangelism, outreach, and care.

Another International Development Grant supported health and education. \$2000 was disbursed to support three schoolteachers studying at Kampala International University. \$1200 was disbursed to support a Public Health Student at Uganda Christian University. These grants address a huge shortage in South Sudan. Because of the long fight for freedom, South Sudan has very few indigenous schoolteachers or health workers.

The Episcopal Church United Thank Offering has been most generous in supporting our companion relationship. As mentioned above, the United Thank Offering financed two new school buildings for St. Timothy's Pre & Primary School. They donated \$44,372 for this project. (Additional funds from The United Kingdom financed a third building.) For the first time since the school began all the children can be inside for learning. Previously most classes met under mango trees. The children had to go home when it rained. This School serves approximately 2000 students. It is ranked number one in the state.

The United Thank Offering is helping meet the health goals with a grant to renovate the Good Samaritan Primary Health Care Clinic and greatly upgrade the Mid-Wife and Birthing services. This was one of the first efforts to improve health when the Diocese of Nzara was established. Trained midwives with certification and regular refresher training lead the effort. A network of Traditional Birth Attendants assist and reach out to remote areas of the diocese. The clinic in Nzara includes a birthing center to improve maternal and infant safety during delivery. Programs for pre-natal and post-natal care have been established. The Midwives and Traditional Birth Attendants have saved many lives. However, the civil war and inflation has taken a toll. The clinic is in serious disrepair. The birthing facilities are barely adequate. The United Thank Offering grant of \$28,520 will help renovate the clinic plus provide better tools and equipment. It will even provide bicycles so the Traditional Birth Attendants can reach remote women needing help.

Last year we reported wonderful news. In the spring of 2018 Aqua-Africa installed the first ever water tower in Nzara and a distribution system to supply the village with dependable safe drinking water. Aqua-Africa is a Non-governmental organization (NGO) in Omaha, Nebraska. May God bless them. They do not just build and leave. When Aqua-Africa builds a facility, they conduct Micro-Democracy training for the village. This prepares villagers to operate and pay for the system going forward. They also provide maintenance training and stay involved for five years. Early in 2019 the new water system was disabled. Aqua-Africa expedited the repair.



Knowing that Nzara Diocese is not just Nzara town, Buey Tut of Aqua-Africa and Bp. Peni worked out a plan to drill bore holes and install hand pumps in smaller villages. This will be financed by Rotary International and The Rotary Club of Wausau, WI. The Diocese of Iowa will supplement the Rotary Grants with \$10,000.

The Rev. Bob North and his wife, Karen, spent two years in Nzara. Karen taught English classes and is updating the Zande/English Dictionary. Fr. Bob raised money to buy a dump truck. This truck has been critical; moving construction materials for a conference center, the clinic, the diocesan office, a computer center and seven tukals (small homes) for staff and visitors, plus the new school and other infrastructure projects. On many of these projects Fr. Bob helped with the design and supervision of the construction. He and Karen also raised substantial funds over the years to support students and help pay the clinic staff.

Father North will visit Nzara in September of this year. While there he will help build benches for the school. He also plans to survey the water needs of remote villages in order to continue expanding access to safe water.

The interim peace plan signed last fall brought a measure of calm in the country. Pray for peace. Nzara's parishes are listed for our daily prayers in the Joint Intercession List on the Diocese of Iowa website: <https://www.iowaepiscopal.org/Ministries/prayer.html>

### **Companions of the Diocese of Swaziland in Eswatini**

**The Rev. Stacey Gerhart, coordinator**

The Diocese of Swaziland, our long-standing companion in the country renamed Eswatini, has had its share of ups and downs this year. The economy in Eswatini is down but the rainfall in central and northern parts of the country have finally been plentiful for which we thank God.

One project highlight of 2019 is the success of the Diocesan piggery in Luve which was started in 2016 with a UTO grant sponsored by the Diocese of Iowa. The piggery's profitability has afforded the opportunity to expand the operation; a portion of income was reinvested to purchase 4 more sows so now they have 15 sows and 1 boar. With the help of a \$3500 OWOC Development Mini Grant this year the piggery will expand its facility to include another 8 stalls to house the weaned piglets while they grow to market-size in 3 months. St. Andrew's Church in Luve gave permission for the piggery to use adjacent land on which they will grow yellow maize. This will help cut down on costs for feeding the pigs. When the piggery workers finish moving the barbed wire fencing to the new perimeter, they will till and plant. Profits from the piggery help fund the Diocese's social development grants. Another success has been the reforestation project at Usutho Mission.

This year the Diocese of Swaziland, sponsored by the Diocese of Iowa, received a UTO grant for E2 million (approximately \$140,000 U.S.) to build 2 hostels (apartment buildings) for students attending the agricultural college in Luyengo. Construction complications have delayed the opening of the first building.

The water harvesting and gardening projects around the diocese have not panned out as hoped. The drought in the south was the demise of water harvesting and gardening at Mbava. Other gardens have failed because of lack of commitment from the local communities.

The 15 Neighborhood Care Points (NCP), with financial assistance from the Diocese of Iowa, continue to play a vital role in providing food for orphans. The NCP's are monitored on a regular basis to make certain that the neediest places in the diocese are being served.

At the invitation of Bishop Wamukoya, the Rev. Stacey Gerhart served in the Diocese of Swaziland for 3 months this summer. She alternated assisting at the Cathedral in Mbabane and at St. George's and St. James in Manzini. It was a rich and rewarding experience for everyone involved.

Bishop Ellinah is keen to emphasize that although the financial assistance is a big help, the greatest benefit of the diocesan companionships is the relationships. The personal connections and the prayers nurture hope.

### **COMMISSION ON STEWARDSHIP AND PLANNED GIVING**

**Anne Wagner, Diocesan Comptroller**

The Stewardship Commission has been without a Chair over the past year, and has not been as active as in the past. The Stewardship Commission is encouraging congregations to take advantage

of 3-years of online stewardship tools, resources, and webinars through Church Development offered as part of the GILEAD Diocesan Campaign [https://www.church-development.com/gilead\\_account\\_signup](https://www.church-development.com/gilead_account_signup). Additional stewardship resources are also available at <https://www.iowashare.org/financefundraising>.

**Investment Committee**  
**Mr. William H. Smith, Jr., Treasurer and Ms. Anne Wagner, Assistant Treasurer**

The primary responsibility of the Investment Committee is to review and evaluate the performance of investments of the Episcopal Corporation of the Diocese of Iowa and to advise the Board of Directors on these investments.

Our largest investment fund, the Iowa Diocesan Foundation Fund, was established in 1959 and offers a convenient, professionally managed investment fund for the congregations of the Diocese of Iowa, and some of the special purpose funds given to the Diocese. By creating a common pool of diocesan and congregational investable funds, participants are able to invest in a well-diversified portfolio. The Foundation Fund is managed by the Episcopal Church Foundation, in partnership with State Street Global Advisors.

The Episcopate Fund was established by the Sixth Bishop of Iowa and his wife, Gordon V and Florence K. Smith, and is intended to help underwrite the annual compensation package for the Bishop of Iowa. It provides for 65% of the bishop's compensation package. The Episcopate Fund has been managed by Wells Fargo Advisors.

We have a socially responsible fund invested with the Sustainability Group. It invests in projects such as loans for low-income housing, and economic opportunity and development.

**Ways and Means Committee**  
**Ms. Anne Wagner**

The Ways & Means Committee oversees the preparation, presentation and funding of the annual Diocesan budget; monitors current year income and expenditures, congregational pledges, parochial reports, and audits. They report to the Board of Directors.

**OLDER ADULT MINISTRY DEVELOPMENT TEAM**

**Jenn Latham**

The Diocese of Iowa's Older Adult Ministry Development Team seeks to support churches in ministry among and for older adults. Their overall mission is to encourage and assist congregations in beginning a conversation around the issues of aging. The OAMDT has a vision that each congregation will be a place where people of all ages are welcomed and valued and where the churches of the Diocese of Iowa will provide resources and assistance to its members as they go through the lifelong process of aging. Has your church used the "Is your church older-adult friendly?" checklist on the [Older Adult Ministry Resource page](#) of [www.iowashare.org](http://www.iowashare.org) to start a conversation about Ministry to this demographic?

With the death of team leader, The Rev. Warren Frelund, in 2018 the OAMDT has been on hiatus and hopes to begin meeting again in 2019-20. We welcome to the work of the group any who feel called to this ministry. Join us by contacting the Diocesan Office.

**YOUNG ADULT MINISTRY DEVELOPMENT TEAM (YAMDT)**

**Traci Ruhland-Petty**

The year since our last convention has been a time of transition. The Young Adult Ministry Development Team (YAMDT) has not formally met during the past year, and there is no longer a staff position of Young Adult Missioner. But, new Administrative Missioner Traci Ruhland-Petty is serving as staff liaison to and for young adults, and is a resource to anyone looking to connect or be involved.

Initiatives, conceived of and led by young adults, are developing across the diocese in a more organic fashion. From social justice and public policy involvement, to retreats and intentional fellowship time, we're connecting with each other across congregations and chapters, and becoming more involved as leaders and participants, as vestry members and as clergy. This transition

time allows us an opportunity to reflect on what we've done, and discern what we'd like to do next. We're intentionally leaving space to brainstorm and try new things, supporting each other's ideas, passions, and leadership.

Are you looking to connect with other young adults in your area and/or across the diocese? What are you passionate about? What are you currently involved in or what would you like to be involved with (in your congregation, school/work, community) and do you need or would you like support in any of these areas? Or are you feeling stretched and are looking for support as you refocus and work on taking some intentional rest time? Are you wondering what other young adults are experiencing as they serve on a vestry for the first time? What would you like to have available to young adults in your congregation and/or across the diocese? What is your vision for your congregation, the diocese, and/or the church? We want to hear from you. Contact Traci at [tpetty@iowaepiscopal.org](mailto:tpetty@iowaepiscopal.org) to get connected.

And to all young adults, whether this is your first time at convention or you've been coming for years, whether you're serving on a vestry and starting new initiatives or showing up to a service or an event once in a blue moon, thank you. Thank you for showing up, for being involved at whatever level and whatever amount you're able, and for just being you.

### YOUTH MINISTRY DEVELOPMENT TEAM (YMDT)

Jeff Cornforth, convener & Amy Mellies, Youth Missioner

The Youth Ministry Development Team (YMDT) continues living into its mission to resource, serve, support, and minister to the children, youth, and adult leaders in our diocese. The team is comprised of youth and adults from across the diocese who are dedicated to the spiritual and personal growth of young people in the Episcopal Church. Our ministry is directed by our intentional goals:

- to bring the youth of this diocese together to build community and develop Christian leadership
- to help young people claim their places in the church at all levels
- to equip and train the adults who work with young people in our diocese

Members of YMDT continue to participate in an annual weekend planning session/retreat. We have found this intentional time spent together in prayer, work, and fellowship has deepened our ministry and enhanced our programs. The annual retreat in 2019 was held February 2-4 at Christian Conference Center in Newton.

The following events were held over the last year:

- **Diocesan Convention 2018:** Youth Delegates to the 166th Diocesan Convention: Maire Powell of Church of the Saviour, Clermont, Alenah and Ayanna Rankin of St. Paul's, Council Bluffs were chosen to represent the voices of the youth of the diocese. Several other high school students joined the group of delegates as Youth Visitors to Convention. The tenth annual Youth Lock-in at the Cathedral (grades four through nine) took place in conjunction with Convention. Childcare and a children's program were both offered free of charge to children ages infant to grade three.

- **Ski Trip:** The annual ski trip was scheduled for January 18-20, 2019, but had to be rescheduled due to a snowstorm. The event took place February 8-10 at Camp Sacajawea in Boone, Iowa, with 83 youth and adult chaperones attending the weekend. Dale Schirmer of Grace, Cedar Rapids and Amy Mellies of St. John's, Ames coordinated the event. Participants enjoyed skiing and snowboarding at Seven Oaks in Boone. Moving to a more central location has allowed youth and adults from the western side of the Diocese to attend. In addition, Seven Oaks has snow tubing as a non-ski option, which invites more participation in the snowy fun.

- **Happening:** The Happening program has declined in the last couple of years. The last several years we have had two Happening events taking place each calendar year. Happening #46 was held March 8-10, 2019, at St. Luke's, Cedar Falls. Ursula Leksell of Church of the Good Shepherd, Webster City was rector for the weekend; Amy Mellies of St John's, Ames and Kristina Kofoot of St. Luke's, Cedar Falls served as Coordinators (adult leaders) and Jack Greve, as our musician. 23 youth and adults participated. Happening #47 was held at St Paul's, Council Bluffs August 31 – September 2, 2019. Co-rectors (youth leaders) were Annika Baker of St. Anne's, Ankeny and Grace Flemming of Christ Church, Cedar Rapids; Amy Mellies of St. John's, Ames and Abby Haggerty of St. Paul's, Council Bluffs as Coordinators (adult leaders). 25 youth and adults participated. Happening is

presented by high school youth for high school youth with the help of lay adult leadership and clergy. This is achieved through youth-led group activities, games, skits, singing, and worship. During the weekend, participants are invited to consider various aspects of their lives, God, their relationships with God in Christ, and their responses to God. One of the most distinctive characteristics of the Happening experience is the ongoing community of youth as part of the Happening team. The leadership development that takes place during Happening weekends encourages youth to claim their places in the church and community at large. Starting in the spring of 2020 we will only have one Happening per year.

- **New Beginnings:** Like Happening, New Beginnings is offered twice each year in order to enable as many youth as possible to attend and have opportunities for leadership roles in the church. New Beginnings #22 took place April 26-28, 2019 at St. Luke's, Cedar Falls, and was led by Shepherds (youth leaders) Nancy Ardon of St. Anne's, Ankeny and Cameron Wheeler of St. Timothy's, West Des Moines. Amy Mellies from St. John's Ames served as coordinator (adult leader) and Jack Greve as our musician. 28 youth and adults participated. New Beginnings #23 will be held October 11-13 at St. John's, Dubuque, and will be led by two Shepherds (youth leaders). Dale Schirmer of St John's, Mason City will serve as coordinator (adult leader). At the time of this report, registration had not yet closed and numbers are yet to be determined. New Beginnings is a junior high retreat designed to respond to the unique issues, concerns, and needs of teenagers. It is run by a team of motivated Christian youth dedicated to serving all on the weekend by living the gospel of Jesus Christ. It is also a chance for youth to reflect on the important relationships in their lives and consider making a "new beginning." In both Happening and New Beginnings, returning youth serving on staff are encouraged to live into a model of "servant leadership" that emphasizes a ministry of caring and support for those they serve.

- **Summer Ministry School and Retreat:** Children and youth of all ages participated in the annual Ministry School and Retreat June 14-16, 2019 on the campus of Grinnell College in Grinnell. Youth who participated in the youth lock-in slept at St. Paul's Grinnell, playing games, learning about St. Paul's prairie, picking up trash in a nearby park and did crafts. Mike Wagner, Ali Turnquist, and Gailanne Dill coordinated the youth track. Nursery care was provided free of charge to parents and families attending the event.

- **Summer Camp: EPIC** was held July 29 – August 2, 2019 at Pictured Rocks UMC Camp in Monticello. Children and youth entering grades 4-12 attended. Campers enjoyed swimming, hiking, rock wall climbing, a talent show, arts and crafts, and much more. Kristina Kofoot of St Luke's, Cedar Falls served as camp director and was supported by four chaplains and a number of deans and counselors—all adult volunteers who very generously gave up a week of their summer to be with us. This year's theme was "Oh the Places You'll Go: Your Journey with Jesus." EPIC 2019 had 85 total campers and staff. The vast majority of campers are able to attend camp thanks to financial assistance from their parish and/or the diocese.

Youth Ministry in the Diocese of Iowa relies on many volunteers and donations. Thank you to the adults who spend their weekends sleeping on church floors and in camp bunk beds while chaperoning youth events. Thank you to all who provided transportation and donated food and funds. And thank you to the parents who support their children's participation in diocesan youth events. Youth Ministry is an important part of our life together as the Diocese of Iowa. As the YMDT plans the events for each year, great effort is made to make them accessible for as many of our young people as possible by seeking locations in different parts of the state. Not only does this make transportation to these events more manageable for parents and participants, but also allows many parishes to offer hospitality and support to our youth. There are differing requirements for accommodations, but we would welcome an invitation from any parish interested in hosting a future event. We are always in need of more volunteers as well. We welcome all who feel the call to work with the youth around the Diocese. Our youth are ready and willing to learn more about God, their faith and how they can contribute to their communities. If you feel a call to work with our youth, please contact YMDT.

# Iowa Regional Mission Chapters

## Central

Grinnell, St. Paul's  
Marshalltown, St. Paul's  
Newton, St. Stephen's

## East

Bettendorf, St. Peter's  
Clinton, Christ  
Davenport, St. Alban's  
Davenport, Trinity Cathedral  
Dubuque, St. John's  
Durant, St. Paul's  
Maquoketa, St. Mark's  
Muscatine, Trinity

## Metro

Ames, St. John's by the  
Campus  
Ankeny, St. Anne's by the  
Fields  
Boone, Grace  
Des Moines, St. Andrew's  
Des Moines, St. Luke's  
Des Moines, St. Mark's  
Des Moines, St. Paul's  
Cathedral  
Indianola, All Saints'  
West Des Moines, St. Timothy's

## North Cedar Valley

Cedar Falls, St. Luke's  
Clermont, Saviour  
Decorah, Grace  
Independence, St. James'  
Waterloo, Trinity  
Waverly, St. Andrew's

## North Central

Algona, St. Thomas'  
Charles City, Grace  
Emmetsburg, Trinity  
Fort Dodge, St. Mark's  
Iowa Falls, St. Matthew's  
Mason City, St. John's  
Webster City, Church of the  
Good Shepherd

## South Central

Chariton, St. Andrew's  
Oskaloosa, St. James'  
Ottumwa, Trinity

## Southeast

Burlington, Christ  
Fort Madison, St. Luke's  
Keokuk, St. John's  
Mt. Pleasant, St. Michael's

## Southwest

Trinity Cluster:  
Carroll, Trinity  
Denison, Trinity  
Harlan, St. Paul's  
Council Bluffs, St. Paul's  
Glenwood, St. John's  
Perry, St. Martin's  
Shenandoah, St. John's

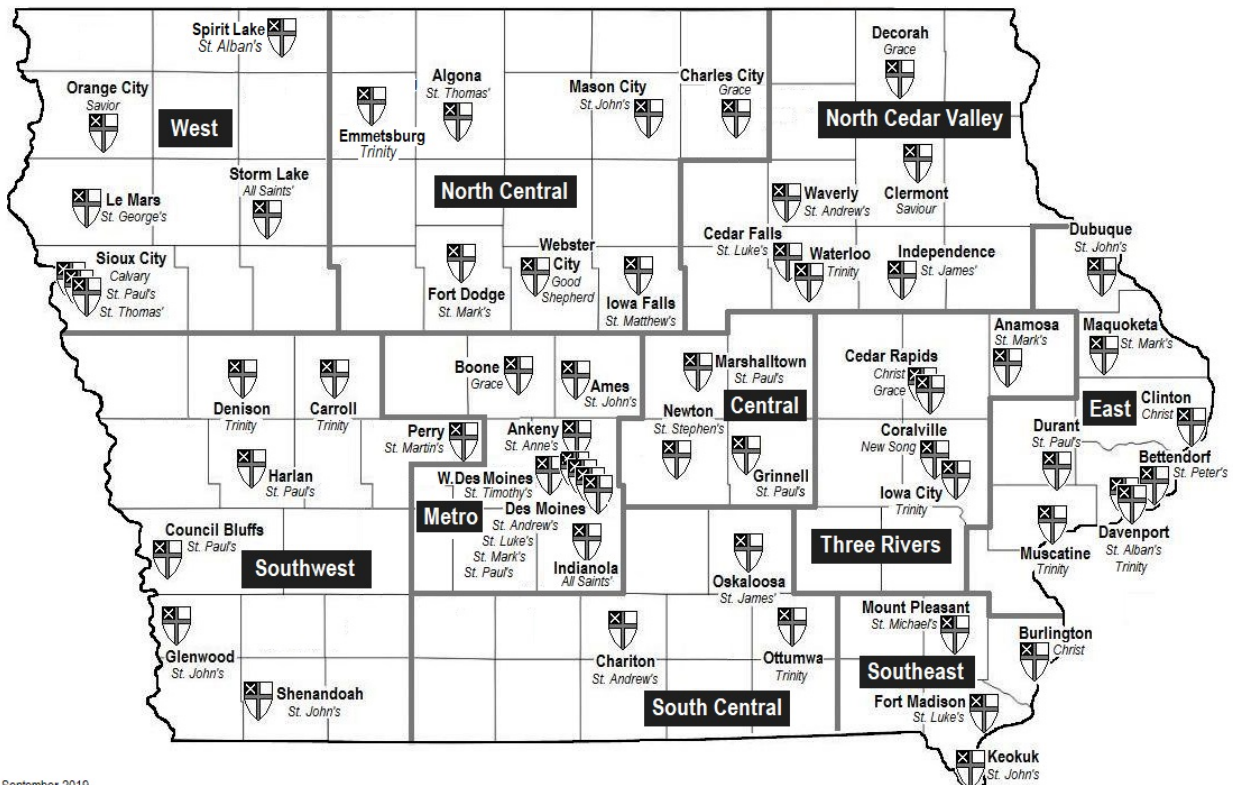
## Three Rivers Chapter

Anamosa, St. Mark's  
Cedar Rapids, Christ  
Cedar Rapids, Grace  
Coralville, New Song  
Iowa City, Trinity

## West

Le Mars, St. George's  
Orange City, Savior  
Sioux City, Calvary  
Sioux City, St. Paul's Indian  
Mission  
Sioux City, St. Thomas'  
Spirit Lake, St. Alban's  
Storm Lake, All Saints'

## Episcopal Diocese of Iowa - Mission Chapters



**Central Chapter**  
**The Rev. Richard Graves, Chapter's Board Representative**

The Central Chapter of the Episcopal Diocese of Iowa is made up of three congregations: St. Paul's, Grinnell, St. Stephen's, Newton, and St. Paul's, Marshalltown. We held two meetings in 2019 to promote fellowship, share best practices, provide input to the upcoming budget process, and to share the highlights of parish life with each other.

**St. Stephen's, Newton**, recently established a single 9:00 a.m. service on Sunday morning and this merger has received wide approval from the congregation. The church also has established a twice monthly "Breaking Bread" service on Saturday and a 2nd Wednesday service followed by a parish dinner and timely topic study.

The congregation has established a second "Blessing Box" that contains needed items at no charge to the community and has taken a major leadership role in the creation of the Newton-Peer Drop in Center in a repurposed building located across the street from the church.

The eight-session renewal program "Just Faith" will be offered at St. Stephen's, beginning on October 2. As past participants of this program, the congregation is eager to share this offering with the diocese, since it has brought so much new life to them.

St. Stephen's will host a Dismantling Racism Training on November 2, from 9:00 a.m. to 3:30 p.m.

**St. Paul's, Marshalltown**, sustained significant damage in the July 2018 tornado and much of the energy of the congregation has gone toward repairing the church and property. Now that this process is nearly completed, the church looks forward to spending more of its time discerning how it can be of best use to God.

One of the mission goals of the church has been to reach out to our neighborhood, which is increasingly Hispanic in composition. Two Latino families are now worshipping actively on Sunday and assuming other ministry roles within the congregation.

The parish just renewed its contract with HEAD START and proudly hosts two classrooms of this educational outreach in its facility.

Other areas of outreach include Meals on Wheels, serving dinner at House of Compassion every other month, and promoting literacy through a Free Library.

**St. Paul's, Grinnell**, enjoys a lively parish atmosphere. They continue their long-established campus ministry at Grinnell College by providing a spiritual home to faculty, staff, and students and participating in a broad range of campus activities. Sunday mornings find the church mostly full and the sound of children can be heard before, during, and after the service.

St. Paul's began a Prairie Restoration Project on their property this year. It occupies a good bit of their front yard and students of Grinnell, through the Conrad Environmental Research Area (CERA), have been taking an active part in the project.

The Fourth Annual Divots for the Bishop Golf Tournament was held once again, which engaged three parishes and 19 participants and generated \$500 for GILEAD.

The multiple year renovation of the Kitchen and parish hall is now completed and plans are now underway to address action items related to the parish yard.

**East Chapter**  
**The Rev. Elaine Caldbeck, Convener**

St John's, Dubuque, serves a community meal on the fifth Sunday, and have a new choir director. Christ Church, Clinton, has book groups, garden/food outreach, and is connecting with the larger community especially on food during school breaks, community garage sale. Trinity, Muscatine, has made good progress with the search process, has concerts with local musicians and does laundry love. St Mark's, Makoqueta, has a fifth Sunday potluck, and supports the local food pantry and has grown in membership. Clinton and Bettendorf have switched to one Sunday service. St. John's, Dubuque needs a new musician, and Bettendorf and administrative assistant. Trinity Cathedral continues its outreach and many ministries and is deciding how to handle it's not currently usable rectory. St Peter's Bettendorf continues to have music concerts, and music lessons in its building. The

three Quad Cities congregations worshipped together on fifth Sunday's last year and are switching to joint fifth Saturday evening worship.

As a chapter we approved a resolution to Convention on Human Trafficking and Slavery by Maggie Tinsman.

**Metro Chapter**  
**The Rev. Vincent Bete, Chapter Board Representative**

Metro Chapter congregations continue to focus on building relationships and improving communication.

The Chapter gatherings for Spring and Fall were held at St. John's By the Campus in Ames and at St. Mark's Church in Des Moines, respectively. The highlights of these gatherings include sharing of each parish programs, understanding the GILEAD Campaign, and conversations on finding opportunities for joint projects and fellowship activities.

The partnerships between/among congregations that started last year continue to develop. Joint activities continue in some of these congregations. It is through these partnerships that congregations implemented the Growing Iowa Leaders Day. Needless to say, the Cathedral Church of St. Paul remains to be a center of fellowship not only for the Metro Chapter but to the whole diocese.

This year also saw the beginning of the Clergy Coffee with Conversation that happens every first Tuesday of the month. This is an informal gathering for sharing and support.

**North Cedar Valley Chapter**  
**Mr. Jeff Cornforth, Chapter Board Representative**

The North Cedar Valley is alive and well. Even though many of our member churches are shrinking in size, the spirit is allowing the few of us, to do the work of many more. We are all trying to find different ways to be "church" while still maintaining our Episcopal identity. When we can all do this, we will see a different world.

A few events were held in the NCV over this past year. Engaging all Disciples has "engaged" most of our parishes, and we hope continued pleasure will come with that giving of our treasures.

**North Central Chapter**

The North Central Chapter met in Webster City on April 25, 2019 and in Mason City on September 21, 2019.

**South Central Chapter**

The South Central Chapter met in Chariton on March 23, 2019 and in Oskaloosa on Aug. 31, 2019.

**Southeast Chapter**  
**Susie Messer, Chapter Board Representative**

We met twice this year, once in March and once in August. The general format for each meeting follows:

Prayer and scripture from the day

Name and congregation

Thoughts about chapters:

- What are important things happening around this chapter? What would you like to share from your place?
- Where have you/your congregation struggled this year?
- In what ways have you/has your congregation noticed and reached out to others not in your congregation?
- Thinking about the Diocese as a whole, what directions/ideas do you notice emerging, thinking especially about the Growing Iowa Leaders Days and Diocesan Convention?
- Reflecting on the conversation we just had, how might we capture some of the important sparks that would contribute to the growing light across the diocese?
- Representative from the Board of Directors offers information about GILEAD

**March 3, 2019 Meeting – Christ Church, Burlington** All Churches in the Chapter represented

At this meeting we also announced the information on the Summer Ministry and Retreat taking place in June. Ellen also explained the seven tracks along with the ongoing cohort opportunity that would start with the Retreat. All were encouraged to attend the retreat.

Engaging All Disciples: The Engaging All Disciples day will take place at St. John's in Keokuk Iowa March 23<sup>rd</sup>. St. John's will provide lunch for the attendees. Ideas at this meeting will be shared in terms of what the clusters can do to share and participate in activities together.

Diocesan Budget for 2020: Ellen presented thoughts on how the 2020 budget might be presented to the congregations throughout Iowa. Two Zoom meetings were announced for those that would like to discuss the future budget.

Safeguarding God's People/Children Discussion was about how all in a congregation would complete the online process on the Safeguarding website? It was a general consensus that some in our congregations do not have computers and if they do may not want to be involved with the process. We were encouraged to find out who the administrator in our individual congregation was and also exactly who needs to be trained.

Small Church Quadrant Gatherings The schedule for the meetings was listed. (St. Michael's was the only church from the Southeastern Chapter to attend the meeting on June 29 in Oskaloosa).

The following information represents other notes taken at the meeting:

- Check in – each congregation shared what is going well

St. Michael's, Mt. Pleasant – they now have a director of music. This came out of the Growing Iowa Leader's Day. They are also using preprogramed music during communion and it seems to be working well. There have been quite a few people with major illnesses lately.

St. John's, Keokuk – they also have been experiencing some illnesses this winter. They are sharing a Lenten program with a Lutheran church in town as well as St. Paul's in Nauvoo.

St. Luke's, Ft. Madison – have remodeled the bathroom closest to the sanctuary. It is now handicapped accessible. They will be sharing Lenten luncheons with Parish Partners in Ft. Madison and helping with the Early Easter Sunrise service at the Old Fort. They also have a new sign for the front of the building which will be hung when weather improves a bit.

Christ Church, Burlington – redid the flooring in the parish hall and kitchen. Have begun taking their turn at helping with the new food pantry in the Roman Catholic Church. This is a new pantry in Burlington. The box gardens are anxiously awaiting spring so people can start the planting. Christ Church hosts several community groups in their church. An interest seems to be growing to establish an Order of St. Luke's, and we'll see how this emerges.

- Board rep, Susie Messer gave a report on the Board of Directors meeting held in Jan. Discussion around the report from Meg Wagner about her trip exploring Fresh Expressions. Board reviewed the "gift" policy and has tabled it for more information. The church in Denison has been sold and the congregation in Waverly is renting out space in their building. We talked about contacting the Diocese for resources on how best to handle the renting situations.

- Commended Michelle Moore on her medical missionary work and talked about her willingness to share the story with others who might like to get involved.

- Susie Messer also reported on GILEAD and what it means to be a collaborating congregation. Several mentioned they had received the flyer explaining GILEAD.

- Conversation about EAD day on Mar. 23. Question about accepting dietary restrictions on the registration form. Keokuk is setting up the caterer and the diocese will pay. There was a question about the commissioning service on the EAD day. Can we include the Licensed Ministries people?

- Next meetings: August 18, 2019 at Ft. Madison at 2:00pm and March 15, 2020 at Mt. Pleasant at 2:00pm

**August 18, 2019 Meeting at St. Luke's Ft. Madison** Members from St. Luke's, Christ Church, and St. Michael's were in attendance. Ellen Bruckner represented the Diocese at our meeting.

This meeting took a different format with a Michelle Moore and Amy Hayes presenting the topic of preparing for the end of life. The morning presentation ended with a movie titled "New Rules for the End of Life." The movie was incredible and was highly recommended to be shown throughout our congregations. In fact, all in attendance thought the presentation would be a good topic for a future convention presentation. Along with the presentation, materials were distributed covering



topics of "Five Wishes," "Iowa Physician Orders for Scope of Treatment (IPOST) and "Welcomed to Medicare and Annual Wellness Visits".

We also covered the following topics: Living will; Durable (Medical) Power of Attorney; General Power of Attorney; Informed Treatment Decisions; Personal Readiness; Stages of dying; Belief System, Cultural and Religious.

This presentation took place from 9 to 12 with our chapter meeting immediately following.

#### Chapter Meeting

We "zoomed" with Anne Wagner, Diocesan Comptroller, who presented the 2020 proposed budget. Anne read a letter from the Bishop. A few questions were asked followed by a short discussion of the budget.

Other topics:

- A short report on GILEAD, and the grant process concerning projects for churches was explained

- Book read for convention is on IOWA SHARE

- Convention Eucharist will be live-streamed using U-Tube this year

- We are to print out convention materials prior to convention.

- Survey on congregation vitality due by September 1<sup>st</sup>

- Next Meetings – March 15 2020, St. Michael's Mt. Pleasant at 2:00 pm and August 16th, 2020, at Christ Church Burlington, 2:00 pm

(Many thanks to Ellen Bruckner for sharing her notes with me ~ Suzanne Messer)

#### **Southwest Chapter**

The Southwest Chapter met in Council Bluffs on April 7, 2019 and in Harlan on September 8, 2019.

#### **Three Rivers Chapter**

##### **Melody Rockwell, Convener starting March 24, 2019**

We've had questions from a number of people asking, "What is the Three Rivers Chapter?" It is essentially a cluster of the parishes in this area of the Episcopal Diocese of Iowa, comprised of Christ (Cedar Rapids), Grace (Cedar Rapids), New Song (Coralville) and Trinity (Iowa City). St. Mark's (Anamosa) is nominally still part of the chapter. The 'three rivers' (Cedar, Iowa and Wapsipinicon) designation came about when The Rev. Barbara Schlachter first organized the Celtic Fest that was sponsored by our chapter in 2011, and the Rev. Jennifer Masada designed the crest for our chapter/clan. As I understand it, the purpose of the chapter is to be informed about and encouraged to participate in diocesan activities and informed about diocesan budget matters. We took our congregational cluster relationship a step further with the cooperative Celtic Fest celebrations. The cancelled summer fundraising event was replaced by a Fall Festival on the afternoon of September 28 at Christ Church. The event raised funds to cover the cost of travel for young adults traveling to Iowa from Swaziland.

Grace and Christ congregations, Cedar Rapids, Growing Iowa Leaders workshop, occurred on Saturday, June 8 at Christ Church with Bishop Alan Scarfe and Rev. Kathleen Milligan leading the discussions.

The Three Rivers Chapter 'Dismantling Racism' workshop, held at Christ Church on Saturday, June 22, enjoyed the lively participation of 30 individuals with representation from each of the chapter's four churches. Those lay leaders in our congregations not able to attend the June 22 session in Cedar Rapids are being advised of and encouraged to attend other 'Dismantling Racism' venues throughout the diocese.

The next Three Rivers Chapter meeting, scheduled for Sunday, August 25, will focus on our chapter preparation for the fall festival as well as preparing for the diocesan convention in addition to other items of business as requested by Bishop Alan and member congregations of the chapter.

#### **West Chapter**

The West Chapter met in LeMars on March 23, 2019 and in Spirit Lake on Aug. 24, 2019

## Financial Reports of the Board of Directors:

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### Diocesan Aid to St. Paul's Indian Mission, Sioux City – 2018

Salary & Housing	\$ 54,558
Pension	9,820
Health Insurance	9,756
Travel	4,545
Program	<u>11,000</u>
	\$ 89,679

### Ministry Grants for New Initiatives - 2018

Davenport, Trinity	\$10,000
Denison, Señor de la Misericordia	10,750
Des Moines, St. Mark's	12,000
Indianola, All Saints'	6,000
Spencer, The Way Station	<u>18,000</u>
	\$ 56,750

### Theological Seminary Support – 2018

Anamosa, St. Mark's	To University of the South-Sewanee	\$ 200
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### Promissory Notes Receivable (Revolving Fund) as of Dec. 31, 2018

Bettendorf, St. Peter's	\$ 51,459.16
Clermont, Saviour	5,544.34
Davenport, St. Alban's	8,456.46
Grinnell, St. Paul's	79,168.92
St. Paul's Indian Mission, Sioux City	17,300.00
Webster City, Good Shepherd	<u>753.65</u>
TOTAL	\$ 162,682.53

**EPISCOPAL DIOCESE OF IOWA**  
**Des Moines, Iowa**  
**FINANCIAL STATEMENTS AND SUPPLEMENTARY DATA**  
**December 31, 2018 and 2017**  
**(With Independent Auditor's Report Thereon)**

EPISCOPAL DIOCESE OF IOWA  
Des Moines, Iowa

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INDEPENDENT AUDITOR'S REPORT

Board of Directors  
Episcopal Diocese of Iowa  
Des Moines, Iowa

*Report on the Financial Statements*

We have audited the accompanying financial statements of Episcopal Diocese of Iowa, which comprise the Statements of Financial Position as of December 31, 2018 and 2017, and the related Statements of Activities and Changes in Net Assets, Functional Expenses, and Cash Flows for the years then ended, and the related notes to the financial statements.

*Management's Responsibility for the Financial Statements*

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to error or fraud.

*Auditor's Responsibility*

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits 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 from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

*Opinion*

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Episcopal Diocese of Iowa as of December 31, 2018 and 2017, and the changes in net assets and cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

*Other Matters*

Our audits were conducted for the purpose of forming an opinion on the financial statements taken as a whole. The accompanying supplementary information, included on Pages 20-25 is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and, excluding the budgeted amounts, was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information, excluding the budgeted amounts, has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the supplementary information, excluding the budgeted amounts, is fairly stated in all material respects in relation to the financial statements taken as a whole.

The budgeted amounts have not been subjected to the auditing procedures applied in the audit of the basic financial statements and, accordingly, we express no opinion or provide any assurance on them.

  
MERIWETHER, WILSON AND COMPANY, PLLC  
Certified Public Accountants

June 18, 2019  
West Des Moines, Iowa

## EPISCOPAL DIOCESE OF IOWA

## Statements of Financial Position

December 31,

## Assets

	<u>2018</u>	<u>2017</u>
<b>Current Assets</b>		
Cash	\$ 574,531	314,016
Receivables		
Notes Receivable - Current	24,407	34,245
Diocesan Ministry and Mission Support Receivable	42,319	17,659
Accounts Receivable - Other	11,160	11,884
Conditional Grant - Current	3,200	3,200
Receivable - Iowa Diocesan Foundation Participants	154,219	147,601
Prepaid Expense	3,827	824
Total Current Assets	<u>813,663</u>	<u>529,429</u>
<b>Receivables - Noncurrent</b>		
Contribution Receivable - Remainder Trust	13,668	14,636
Beneficial Interest in Perpetual Trusts	195,036	208,577
Conditional Grant - Noncurrent	26,845	30,045
Notes Receivable - Noncurrent	138,276	158,767
Accounts Receivable - Noncurrent	3,049	6,549
Total Receivables - Noncurrent	<u>376,874</u>	<u>418,574</u>
<b>Investments</b>		
Certificates of Deposit, Money Funds, and Securities	2,187,759	2,427,665
Iowa Diocesan Foundation Fund	5,891,171	6,906,927
Funds Held for the Benefit of Others	5,760,402	6,619,024
Total Investments	<u>13,839,332</u>	<u>15,953,616</u>
<b>Property, Plant, and Equipment</b>		
Land	23,500	24,500
Buildings	671,192	685,292
Furnishings and Equipment	13,727	12,561
	<u>708,419</u>	<u>722,353</u>
Less Accumulated Depreciation	544,013	547,336
Net Property, Plant, and Equipment	<u>164,406</u>	<u>175,017</u>
 Total Assets	 <u>\$ 15,194,275</u>	 <u>17,076,636</u>

## EPISCOPAL DIOCESE OF IOWA

**Statements of Financial Position**

December 31,

**Liabilities and Net Assets**

	<u>2018</u>	<u>2017</u>
<b>Liabilities</b>		
Accounts Payable	\$ 13,045	23,153
Retiree Health Insurance Payable - Current	6,732	7,344
Total Current Liabilities	<u>19,777</u>	<u>30,497</u>
<b>Long-Term Liabilities</b>		
Funds Held for the Benefit of Others	5,760,402	6,619,024
Retiree Health Insurance Payable - Noncurrent	1,325	7,883
Total Long-Term Liabilities	<u>5,761,727</u>	<u>6,626,907</u>
 Total Liabilities	 <u>5,781,504</u>	 <u>6,657,404</u>
<b>Net Assets</b>		
Net Assets Without Donor Restrictions	6,302,006	7,673,467
Net Assets With Donor Restrictions	3,110,765	2,745,765
Total Net Assets	<u>9,412,771</u>	<u>10,419,232</u>
          Total Liabilities and Net Assets	          <u>\$ 15,194,275</u>	          <u>17,076,636</u>

The accompanying notes are an integral part of these financial statements.

## EPISCOPAL DIOCESE OF IOWA

**Statements of Activities and Changes in Net Assets**

Years Ended December 31,

	2018		
	Without Donor Restrictions	With Donor Restrictions	Total
<b>Support and Revenue</b>			
Diocesan Ministry and Mission Support Income	\$ 783,496	--	783,496
Tye Trust, Gifts, and Special Purpose	568,609	183,299	751,908
Investment Income Earned	333,955	94,764	428,719
Net Realized Gain on Investments	160,742	--	160,742
Exchange Reserves	--	168,169	168,169
Net Assets Released from Restrictions - Satisfaction of Usage Restrictions	81,232	(81,232)	--
Total Support and Revenue	<u>1,928,034</u>	<u>365,000</u>	<u>2,293,034</u>
<b>Operating Expenses</b>			
Episcopate	398,343	--	398,343
Administration	203,638	--	203,638
Commissions and Committees	1,399,346	--	1,399,346
Real Estate	11,777	--	11,777
Total Operating Expenses	<u>2,013,104</u>	<u>--</u>	<u>2,013,104</u>
<b>Excess (Deficiency) of Support and Revenue To Expenses before Unrealized (Loss) Gain On Investments</b>	(85,070)	365,000	279,930
<b>Net Unrealized (Loss) Gain on Investments</b>	<u>(1,286,391)</u>	<u>--</u>	<u>(1,286,391)</u>
<b>Change in Net Assets</b>	<u>(1,371,461)</u>	<u>365,000</u>	<u>(1,006,461)</u>
<b>Net Assets at Beginning of Year</b>	<u>7,673,467</u>	<u>2,745,765</u>	<u>10,419,232</u>
<b>Net Assets at End of Year</b>	<u>\$ 6,302,006</u>	<u>3,110,765</u>	<u>9,412,771</u>



## EPISCOPAL DIOCESE OF IOWA

## Statements of Activities and Changes in Net Assets

Years Ended December 31,

Without Donor Restrictions	2017 With Donor Restrictions	Total
780,588	--	780,588
342,299	49,446	391,745
139,405	109,817	249,222
122,301	--	122,301
--	202,459	202,459
<u>357,959</u>	<u>(357,959)</u>	<u>--</u>
<u>1,742,552</u>	<u>3,763</u>	<u>1,746,315</u>
392,673	--	392,673
192,640	--	192,640
946,015	--	946,015
10,819	--	10,819
<u>1,542,147</u>	<u>--</u>	<u>1,542,147</u>
200,405	3,763	204,168
<u>744,200</u>	<u>--</u>	<u>744,200</u>
<u>944,605</u>	<u>3,763</u>	<u>948,368</u>
<u>6,728,862</u>	<u>2,742,002</u>	<u>9,470,864</u>
<u><u>7,673,467</u></u>	<u><u>2,745,765</u></u>	<u><u>10,419,232</u></u>

The accompanying notes are an integral part of these financial statements.

## EPISCOPAL DIOCESE OF IOWA

**Statement of Functional Expenses**

Year Ended December 31, 2018

	Management and General	Episcopate	Commissions and Committees	Total
Personnel Costs	\$ 99,786	358,004	217,087	674,877
Travel	--	28,203	19,751	47,954
Convention, Conferences, and Meetings	8,033	1,636	23,064	32,733
Office and Printing	38,463	--	--	38,463
Professional Fees	16,779	--	--	16,779
Insurance	16,577	--	--	16,577
Repairs, Maintenance, and Utilities	24,000	--	--	24,000
Real Estate	11,777	--	--	11,777
Councils and Commissions	--	500	4,655	5,155
Reserve Expenditures and Support to Others	--	10,000	911,692	921,692
Other Program Support				--
One World, One Church	--	--	162,992	162,992
Congregational Life	--	--	9,175	9,175
Youth Ministry Development Team	--	--	39,246	39,246
Jubilee Ministry	--	--	10,000	10,000
Stewardship	--	--	--	--
Designated Purpose Expenditures	--	--	1,684	1,684
	<u>\$ 215,415</u>	<u>398,343</u>	<u>1,399,346</u>	<u>2,013,104</u>
Total	<u>\$ 215,415</u>	<u>398,343</u>	<u>1,399,346</u>	<u>2,013,104</u>

The accompanying notes are an integral part of these financial statements.

## EPISCOPAL DIOCESE OF IOWA

**Statement of Functional Expenses**

Year Ended December 31, 2017

	<u>Management and General</u>	<u>Episcopate</u>	<u>Commissions and Committees</u>	<u>Total</u>
Personnel Costs	\$ 85,609	357,143	251,252	694,004
Travel	--	23,939	37,915	61,854
Convention, Conferences, and Meetings	6,689	1,291	19,430	27,410
Office and Printing	37,799	--	--	37,799
Professional Fees	17,903	--	--	17,903
Insurance	20,640	--	--	20,640
Repairs, Maintenance, and Utilities	24,000	--	--	24,000
Real Estate	10,819	--	--	10,819
Councils and Commissions	--	300	3,852	4,152
Reserve Expenditures and Support to Others	--	10,000	399,949	409,949
Other Program Support				--
One World, One Church	--	--	172,286	172,286
Congregational Life	--	--	12,675	12,675
Youth Ministry Development Team	--	--	33,688	33,688
Jubilee Ministry	--	--	12,214	12,214
Stewardship	--	--	185	185
Designated Purpose Expenditures	--	--	2,569	2,569
<b>Total</b>	<b><u>\$ 203,459</u></b>	<b><u>392,673</u></b>	<b><u>946,015</u></b>	<b><u>1,542,147</u></b>

The accompanying notes are an integral part of these financial statements.

## EPISCOPAL DIOCESE OF IOWA

**Statements of Cash Flows**

Years Ended December 31,

	Total All Funds	
	2018	2017
<b>Cash Flows from Operating Activities</b>		
Excess (Deficit) of Support and Revenue to Expenses	\$ (1,006,461)	948,368
Adjustments to Reconcile the Change in Net Assets to Net Cash Used by Operating Activities		
Depreciation Expense	10,777	10,819
Gain of Sale of Assets	(31,081)	--
Unrealized Loss (Gain) on Investments	1,286,391	(744,200)
Realized (Gain) Loss on Investments	(160,742)	(122,301)
Change in Assets and Liabilities		
(Increase) Decrease in Diocesan Ministry and Mission Support Receivable	17,659	3,380
(Increase) Decrease in Accounts Receivable	(38,095)	1,686
(Increase) Decrease in Conditional Grant Receivable	3,200	3,200
(Increase) Decrease in Receivable from the Foundation	(6,618)	(7,348)
(Increase) Decrease in Prepaid Expense	(3,003)	17,512
Increase (Decrease) in Accounts Payable and Other Liabilities	(17,278)	(47,638)
Net Cash Provided (Used) by Operating Activities	<u>54,749</u>	<u>63,478</u>
<b>Cash Flows from Investing Activities</b>		
Net Change in Notes Receivable	30,329	50,696
(Increase) Decrease in Trusts Receivable	14,509	(11,184)
Proceeds from the Sale and Maturity of Investment Securities	360,513	777,754
Purchase of Investment Securities	(230,500)	(786,025)
Purchase of Property, Plant, and Equipment	(1,166)	--
Proceeds from Sale of Assets	32,081	--
Net Cash Provided (Used) by Investing Activities	<u>205,766</u>	<u>31,241</u>
<b>Increase (Decrease) in Cash</b>	260,515	94,719
<b>Cash - Beginning of Year</b>	<u>314,016</u>	<u>219,297</u>
<b>Cash - End of Year</b>	<u>\$ 574,531</u>	<u>314,016</u>

The accompanying notes are an integral part of these financial statements.

## EPISCOPAL DIOCESE OF IOWA

**Notes to Financial Statements**

December 31, 2018 and 2017

**1. Nature of Business and Organization**

The Episcopal Diocese of Iowa (the Diocese) was incorporated under the laws of the State of Iowa for the purpose of accounting for all funds received through church pledges, gifts, and bequests. Funds are disbursed in the many program areas of the Church upon receiving vouchers from the many individual boards, committees, commissions, or agencies which have been authorized to act on behalf of the Diocese of Iowa. The Diocese also accounts for all property purchased, donated, or sold on behalf of the Protestant Episcopal Church in the Diocese of Iowa.

As part of its operations, the Diocese periodically makes unsecured loans to congregations which are a part of the Diocese of Iowa. Payments on the loans are to be made from the operating budgets of these organizations in accordance with an agreed upon payment schedule.

The operations of the Diocese are carried out primarily by volunteers throughout the Diocese of Iowa as well as the Diocesan office (i.e., the Bishop and his staff) which is organized to facilitate the overall program development and administration of the Diocese.

**2. Summary of Significant Accounting Policies****Recently Issued Accounting Pronouncements**

In May 2014, FASB issued ASU 2014-09, Revenue from Contracts with Customers. ASU 2014-09 supersedes the revenue recognition requirements in Revenue Recognition (Topic 605) and requires entities to recognize revenue in a way that depicts the transfer of promised goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled to in exchange for those goods or services. ASU 2014-09 is effective for fiscal years beginning after December 31, 2018. Management is currently evaluating the potential impact that the adoption of this new accounting guidance will have on its financial statements.

**Recently Adopted Accounting Pronouncements**

During the year ended December 31, 2018, Episcopal Diocese of Iowa adopted ASU 2016-14, *Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities*. The amendments in this ASU made improvements to the information provided in financial statements and accompanying notes. The amendments set forth the FASB's improvements to net asset classification requirements and the information presented about the Organization's liquidity, financial performance, and cash flows.

**Cash and Cash Equivalents**

Cash and cash equivalents, for purposes of reporting on the Statements of Cash Flows, consists of checking and savings accounts used for general operations.

**Receivables**

The Diocese records as receivable only those unpaid amounts, which are believed to be collectible. Therefore, no allowance for doubtful accounts has been provided for in the financial statements. No finance charges are applied to past due accounts. Accounts receivable over ninety days old as of December 31, 2018 and 2017 were \$2,836 and \$830, respectively.

**Investments and Security Valuation**

Investments include those that belong to the Diocese as well as those held by the Iowa Diocesan Foundation Fund on behalf of others. All investments in securities are recorded at their estimated fair value as described in Note 6.

### **Funds Held for the Benefit of Others – Iowa Diocesan Foundation Fund**

The Board of Directors of the Diocese acts as trustee of the Iowa Diocesan Foundation Fund, a common investment fund available to congregations and other organizations of the Diocese of Iowa. The Foundation Fund invests primarily in marketable equity and debt securities which are carried at fair market value.

In the ordinary course of business, the Diocese through the Iowa Diocesan Foundation Fund, acts as a custodian for funds owned by others and for which no benefit of income or principal is received. In these cases, the balances are treated as liabilities, rather than included in the Diocese's net assets, and as assets held in investment accounts. The income derived from these investments is not included on the Statements of Activities but reflected as a change in the value of related assets and liabilities.

### **Fair Value of Financial Instruments**

The Diocese records financial assets and liabilities using a fair value hierarchy, which prioritizes the inputs used in measuring fair value into three broad levels as follows:

Level 1 – Quoted prices (unadjusted) are available in active markets for identical assets or liabilities as of the reporting date.

Level 2 – Pricing inputs are quoted prices for similar assets and liabilities in active markets or inputs that are observable for the asset or liability, either directly or indirectly through market corroboration, for substantially the full term of the financial instrument.

Level 3 – Significant inputs to pricing have little or no observability as of the reporting date. The types of assets or liabilities included in Level 3 are those with inputs requiring significant management judgment or estimation, such as complex and subjective models and forecasts used to determine fair value.

As required by FASB ASC 820-10, financial assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The Diocese's assessment of significance of a specific input to the fair value measurement requires judgment and may affect the valuation of fair value assets and liabilities and their placement within the fair value hierarchy levels.

The following valuation techniques were used by the Diocese in estimating the fair values of financial instruments:

Mutual Funds – The fair values of mutual funds are based on quoted market prices of the shares owned by the Diocese.

Cash and cash equivalents and short-term investments – amounts reported for these instruments are historical cost which approximates their fair value.

Iowa Diocesan Foundation Fund – consists of mutual funds, common trust funds, and exchange traded funds representing debt and equity securities that generally are not publicly traded and primarily are valued based upon net asset value. The Fund is divided into participating units which are valued as of the monthly valuation dates set by the Foundation, which is generally the last day of each month.

Contribution Receivable – Remainder Trust – Trust assets are measured using present value of cash flows discounted at a 6% rate for 22 years as of December 31, 2018 (6% for 23 years in 2017).

Beneficial Interest in Perpetual Trusts:

Artemus Bush – Helen Jones Trust – consists of publicly traded debt and equity securities, of which the Corporation has a 20% interest in its investment income. The Diocese's interest in this trust recorded at 20% of its fair market value.

Paul Beer Trust – Trust assets are measured using present value of the annual amount received discounted at a 6% rate for 40 years.

Retiree Health Insurance Payable – liability is measured using present value of the premiums expected to be paid based on retiree life expectancy calculated using the mortality table published by the Office of the Actuary of the Social Security Administration, discounted at 3%. Eligible individuals under age 68 are discounted an additional 10% for each year under 68. During 2010, the Board of Directors elected to terminate the retiree health insurance program effective December 31, 2020.

### Property, Plant, and Equipment

Property, plant, and equipment are stated at cost of acquisition. All land and buildings owned by the Diocese of Iowa are recorded as real estate at their historical cost or fair market value, in the case of gifts. Proceeds from the sale of land and buildings may be retained by the Diocese or passed through to the church. The use of the sales proceeds is determined by the Board on a case-by-case basis.

Depreciation of plant and equipment is recorded over the estimated useful lives of the respective assets using the straight-line method.

<u>Type</u>	<u>Estimated Useful Lives</u>	<u>Method</u>
Buildings	40 Years	Straight-Line
Computers and Equipment	3 - 5 Years	Straight-Line

Expenditures for major repairs or replacements are capitalized and expenditures for repairs and minor replacements are charged to expense.

### Long-Lived Assets

Long-lived assets to be held and used are tested for recoverability whenever events or changes in circumstances indicate the carrying amount of the assets may not be recoverable. When required, impairment losses on assets are recognized based upon the fair value of the asset.

### Restricted Assets

The Organization reports information regarding its financial position and activities according to two classes of net assets: those without donor restrictions and those with donor restrictions. The Organization records contributions received depending on the existence of any donor restrictions. When a donor purpose restriction is accomplished, net assets are reclassified to net assets without donor restrictions and reported in the Statement of Activities as net assets released from restrictions. Income from the restricted net asset funds is classified consistent with such restrictions. Donor restricted contributions whose restrictions are met within the same fiscal year as received are reported as additions to unrestricted net assets.

### Revenue Recognition

Contributions are recognized when a donor makes a promise to give to the Diocese that is, in substance, unconditional. Contributions that are restricted by the donor are reported as increases in net assets without donor restrictions if the restrictions expire in the year the contributions are recognized. All other donor-restricted contributions are reported as increases in net assets with donor restrictions which may be purpose, time, or perpetual in nature. Perpetually restricted net assets represent net assets to be held indefinitely, the income of which is expendable.

### Income Taxes

The Diocese is organized exclusively for religious purposes and is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code.

### Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and 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. Actual results could differ from those estimates.

### Reclassifications

Certain reclassifications to the 2017 financial statements have been made to conform to the 2018 presentation.

3. **Concentration of Credit Risk**

Financial instruments that potentially subject the Diocese to concentrations of credit risk consist principally of demand deposits located at one financial institution. Frequently, the balances of these cash deposits have exceeded the federally insured limit of \$250,000. The Diocese had \$272,677 and \$223 deposited in excess of the insured limits at December 31, 2018 and 2017.

4. **Notes Receivable**

The Diocese maintains a revolving loan fund which enables congregations to borrow funds to meet various needs. The fund contains approximately 6 loans with balances ranging from \$754 to \$79,169 at December 31, 2018. Interest rates vary from 1.25% to 5.50% per annum with maturities generally being 10 years or less.

5. **Conditional Grant**

On April 17, 2003, the Diocese entered into an agreement with the Bishop of Iowa granting \$80,000 for the down payment on a home. The grant is amortizable over 25 years and is factored into the Bishop's annual compensation. In the event the home is sold or destroyed by fire or other natural disaster, the remaining unamortized balance is due and payable from any applicable proceeds. As of December 31, 2018 and 2017, the unamortized balance of the grant was \$30,045 and \$33,245, respectively.

6. **Remainder and Perpetual Trusts**

The Diocese is beneficiary of three trusts. Each trust is valued at the Diocese's share of the underlying investments. All trusts consist of marketable securities and are perpetually restricted net assets. At December 31, 2018, the remainder trust valued at \$13,668 was discounted at 6% over 22 years, the life expectancy of the primary beneficiaries.

7. **Fair Value Measurements**

The Diocese's assets and liabilities which are measured at fair value on a recurring basis are presented below based on the fair value hierarchy levels:

December 31, 2018	Fair Value	Quoted Prices in Active Markets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
<b>Assets</b>				
Cash and Cash Equivalents				
Included in Investments	\$ 121,905	121,905	--	--
Debt Securities	625,000	625,000	--	--
Mutual Funds	1,483,346	1,483,346	--	--
Contribution Receivable - Remainder Trust	13,668	--	13,668	--
Beneficial Interest in Perpetual Trusts	195,036	--	150,498	44,538
	<u>2,438,955</u>	<u>2,230,251</u>	<u>164,166</u>	<u>44,538</u>
Assets Measured at Net Asset Value	<u>11,609,081</u>			
Total	<u>\$ 14,048,036</u>			
<b>Liabilities</b>				
Retiree Health Insurance Payable	<u>\$ 8,057</u>	--	--	<u>8,057</u>



December 31, 2017	Fair Value	Quoted Prices in Active Markets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
<b>Assets</b>				
Cash and Cash Equivalents				
Included in Investments	\$ 79,272	79,272	--	--
Debt Securities	660,000	660,000	--	--
Mutual Funds	1,736,849	1,736,849	--	--
Contribution Receivable - Remainder Trust	14,636	--	14,636	--
Beneficial Interest in Perpetual Trusts	208,577	--	163,730	44,847
	<u>2,699,334</u>	<u>2,476,121</u>	<u>178,366</u>	<u>44,847</u>
Assets Measured at Net Asset Value	<u>13,477,496</u>			
Total	<u>\$ 16,176,830</u>			
<b>Liabilities</b>				
Retiree Health Insurance Payable	<u>\$ 15,227</u>	<u>--</u>	<u>--</u>	<u>15,227</u>

Following is an analysis of Level 3 fair value measurements:

	Beneficial Interest in Perpetual Trusts	Retiree Health Insurance Payable
December 31, 2018		
Beginning Balance	\$ 44,847	15,227
Change in Discounted Present Value	<u>(309)</u>	<u>(7,170)</u>
Ending Balance	<u>\$ 44,538</u>	<u>8,057</u>
December 31, 2017		
Beginning Balance	\$ 45,139	27,818
Change in Discounted Present Value	<u>(292)</u>	<u>(12,591)</u>
Ending Balance	<u>\$ 44,847</u>	<u>15,227</u>

#### Net Asset Value (NAV) per Share

The Diocese has disclosed the category, fair value, redemption frequency, and redemption notice period of those assets whose fair value is estimated using the net asset value per share as of December 31, 2018. The following tables set forth a summary of the investments with a reported NAV.

Fair Value Estimated Using Net Asset Value per Share - December 31, 2018					
Fair Value	Unfunded Commitment	Redemption Frequency	Other Redemption Restrictions	Redemption Notice Period	
Iowa Diocesan Foundation Fund	<u>\$ 11,609,081</u>	<u>--</u>	Monthly	None	1-30 Days
Fair Value Estimated Using Net Asset Value per Share - December 31, 2017					
Fair Value	Unfunded Commitment	Redemption Frequency	Other Redemption Restrictions	Redemption Notice Period	
Iowa Diocesan Foundation Fund	<u>\$ 13,477,496</u>	<u>--</u>	Monthly	None	1-30 Days

8. **Investments**

Investments in CDs, money funds, and securities are stated at fair market value and are summarized as follows as of December 31:

	Cost	Gross Unrealized Gains (Losses) 2018	Market Value
<b>Without Donor Restrictions</b>			
Undesignated and Designated Reserves			
Savings and Daily Cash Funds	\$ 29,986	--	29,986
Certificates of Deposits	32,097	--	32,097
Notes and Mortgages to Community Development Funds	203,905	--	203,905
Total Without Donor Restrictions	<u>265,988</u>	<u>--</u>	<u>265,988</u>
<b>With Donor Purpose Restrictions</b>			
Savings and Daily Cash Funds	9,252	--	9,252
Certificate of Deposit	9,903	--	9,903
Notes and Mortgages to Community Development Funds	62,910	--	62,910
Total With Donor Purpose Restrictions	<u>82,065</u>	<u>--</u>	<u>82,065</u>
<b>With Donor Perpetual Restrictions</b>			
Savings and Daily Cash Funds	40,175	--	40,175
Certificates of Deposit	43,000	--	43,000
Mutual Funds	1,630,025	(146,679)	1,483,346
Notes and Mortgages to Community Development Funds	273,185	--	273,185
Total With Donor Perpetual Restrictions	<u>1,986,385</u>	<u>(146,679)</u>	<u>1,839,706</u>
Total Investments	<u>\$ 2,334,438</u>	<u>(146,679)</u>	<u>2,187,759</u>
	Cost	Gross Unrealized Gains (Losses) 2017	Market Value
<b>Without Donor Restrictions</b>			
Undesignated and Designated Reserves			
Savings and Daily Cash Funds	\$ 11,317	--	11,317
Certificates of Deposits	33,985	--	33,985
Notes and Mortgages to Community Development Funds	215,233	--	215,233
Total Without Donor Restrictions	<u>260,535</u>	<u>--</u>	<u>260,535</u>
<b>With Donor Purpose Restrictions</b>			
Savings and Daily Cash Funds	3,492	--	3,492
Certificate of Deposit	10,485	--	10,485
Notes and Mortgages to Community Development Funds	66,405	--	66,405
Total With Donor Purpose Restrictions	<u>80,382</u>	<u>--</u>	<u>80,382</u>
<b>With Donor Perpetual Restrictions</b>			
Savings and Daily Cash Funds	16,007	--	16,007
Certificates of Deposit	45,530	--	45,530
Mutual Funds	1,590,024	146,825	1,736,849
Notes and Mortgages to Community Development Funds	288,362	--	288,362
Total With Donor Perpetual Restrictions	<u>1,939,923</u>	<u>146,825</u>	<u>2,086,748</u>
Total Investments	<u>\$ 2,280,840</u>	<u>146,825</u>	<u>2,427,665</u>

Realized gains and losses are determined based on the average cost method. Sales proceeds and gross realized gains and losses on marketable equity and debt securities were as follows for the years ended December 31:

	<u>2018</u>	<u>2017</u>
Sale Proceeds	<u>\$ 360,213</u>	<u>777,754</u>
Gross Realized Losses	<u>\$ --</u>	<u>--</u>
Gross Realized Gains	<u>\$ 160,742</u>	<u>\$ 122,301</u>

Investment income for the year ended December 31, 2018 is reported in the Statement of Activities net of \$17,072 in investment advisory fees (\$16,800 in 2017).

#### 9. Net Assets

Net Assets Without Donor Restrictions – The Episcopal Diocese of Iowa's net assets without donor restrictions were received without external restrictions and are generally available for ongoing operating purposes. The undesignated and designated reserves consist of separate reserves, which are established for specific purposes and are administered by the Episcopal Diocese of Iowa Board of Directors and/or the Bishop of the Diocese of Iowa, summarized as follows as of December 31:

	<u>2018</u>	<u>2017</u>
Operating Funds		
Undesignated Reserves		
Undesignated Funds	\$ 1,049,430	998,903
Net Gain on Investments	1,978,953	3,379,968
Other	(13,001)	79,834
	<u>3,015,382</u>	<u>4,458,705</u>
Designated Reserves		
New Mission Development	37,007	44,696
Working Capital Supplement	280,000	275,204
Land Sites	50,788	50,788
Episcopate Election Reserve	170,024	152,092
GIL - 2018-2019 Events	127,378	(909)
Revolving Fund	2,136,208	2,150,180
Mills House Repairs	28,478	11,029
Communications Reserve	23,523	--
Diocesan Campaign	(125,035)	(67,556)
Altedruse Bequest - E-Seminary	99,883	99,886
Red Oak Reserve	16,975	19,272
Other	50,182	78,985
	<u>2,895,411</u>	<u>2,813,667</u>
Episcopal Center of Camps and Conferences	<u>260,889</u>	<u>258,994</u>
Real Estate Funds	<u>130,324</u>	<u>142,101</u>
Total Net Assets Without Donor Restrictions	<u>\$ 6,302,006</u>	<u>7,673,467</u>

Net Assets With Donor Restrictions – The Episcopal has received donations and bequests, which under terms of their receipt are to be used for specific purposes and are classified net assets with donor restrictions. The exchange reserves serve as clearing accounts for receipts designated by the source, either inside or outside of the Diocesan structure, for transmittal outside the Diocese. Special purpose funds were established to account for contributions restricted by an outside source for special purpose expenditures and are administered by the Bishop and/or the Board of Directors. Net assets with restrictions perpetual in nature are contributions received by the Diocese to generate income for transferal to other funds. These funds are administered by the Diocese in accordance with the terms specified by the donor at the time of the gift or bequest.

A summary of these net assets is as follows at December 31:

	<u>2018</u>	<u>2017</u>
Subject to Purpose Restrictions		
Exchange Reserves		
GILEAD Diocesan Campaign	\$ 305,091	--
General	17,808	19,808
Other	19,153	(2,280)
	<u>342,052</u>	<u>17,528</u>
Special Purpose Reserves		
John Miller Scholarship	28,510	28,510
Morgan Estate - Grinnell College	187,229	176,823
Bishop's Fund for Continuing Clergy Education	156,501	133,839
Agape Café	18,360	194
Grant - Reconciliation & Justice	51,258	5,389
Grant - Beloved Community	18,641	--
Waters of Hope	22,319	33,477
College Fund for Clergy Youth	19,524	14,000
Other	(46,910)	8,215
	<u>455,432</u>	<u>400,447</u>
Perpetual in Nature		
Gordon V. and Florence K. Smith Episcopate Fund	1,651,713	1,651,713
Bishop's Fund for Continuing Clergy Education	100,000	100,000
Council Program	92,626	92,626
Bishop's Fund for Clergy Assistance	69,135	69,135
Perpetual Trust	195,036	208,577
Bishop's Fund for Theological Education	152,470	152,470
Bishop's Crisis Relief Fund	23,193	23,193
Other	29,108	30,076
	<u>2,313,281</u>	<u>2,327,790</u>
Total Net Assets With Donor Restrictions	<u>\$ 3,110,765</u>	<u>2,745,765</u>

10. **Liquidity and Availability of Financial Assets**

Episcopal Diocese of Iowa's financial assets available for general expenditure within one year of the balance sheet date are summarized as follows at December 31:

	<u>2018</u>	<u>2017</u>
Financial Assets at Year-End		
Cash	\$ 472,142	314,016
Receivables	235,305	214,589
Investments	13,839,332	15,953,616
	<u>14,546,779</u>	<u>16,482,221</u>
Less Those Unavailable for General Expenditures Within One Year		
Funds Held for the Benefit of Others	(5,760,402)	(6,619,024)
Board Designated Reserves	(2,895,411)	(2,813,667)
Episcopal Center for Camps and Conferences Reserve	(260,889)	(258,994)
Real Estate Funds Reserve	(130,324)	(142,101)
Net Assets with Donor Restrictions	<u>(3,110,765)</u>	<u>(2,745,765)</u>
Financial Assets Available to Meet Cash Needs for General Expenditures Within One Year	<u>\$ 2,388,988</u>	<u>3,902,670</u>

Episcopal Diocese of Iowa receives substantial support from restricted contributions. Because a donor's restriction requires resources to be used in a particular manner or in a future period, sufficient resources must be maintained to meet those responsibilities to its donors. As a result, financial assets may not be available for general expenditure within one year. As part of Episcopal Diocese of Iowa's liquidity management it follows the policy of structuring its financial assets to be available as its general expenditures, liabilities, and other obligations come due. To help manage unanticipated liquidity needs, the Board has established designated reserves which may be drawn, upon Board approval, in the event of an immediate liquidity need.

**11. Retirement Compensation Plans**

In order to provide retirement benefits to the full-time employees of the Diocesan office, the Episcopal Diocese of Iowa participates in a multi-employer pension plan. The plan provides benefits to substantially all employees in the Diocese. The pension expense for the year ended December 31, 2018 was \$70,533 (\$72,334 in 2017).

**12. Medical and Life Insurance for Retired Clergy**

It is the policy of the Convention of the Diocese of Iowa to maintain medical and life insurance coverage up to certain limits for the lifetime of all retired and disabled Diocesan clergy who meet certain required criteria. Medical and life insurance premiums paid for retired clergy for the year ended December 31, 2018, was \$11,411 (\$9,055 in 2017).

**13. Operating Leases**

The Diocese leases various office equipment expiring at various times through 2021. Rent expense for the years ending December 31, 2018 and 2017, totaled \$7,533 and \$8,955, respectively.

Minimum future rental payments under these leases as of December 31 through their final maturities are as follows:

2019	\$ 3,369
2020	873
2021	<u>509</u>
	<u>\$ 4,751</u>

**14. Endowment Funds**

The Diocese's endowment funds consist of net assets without donor restrictions (undesignated and designated reserves) and net assets with donor restrictions (subject to purpose restrictions available for projects and perpetual in nature which provide that the principal be invested for perpetuity with only the income available for use). As required by generally accepted accounting principles, net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

The Board of Directors of the Diocese has not fully reviewed and interpreted the provisions of Uniform Prudent Management of Institutional Funds Act, which was adopted as law in the State of Iowa during 2008. At the present time, the Diocese has adopted the practice of preserving the fair value of the original gift as of the gift date of the perpetually restricted endowment funds absent explicit donor stipulations to the contrary. As a result, the Diocese classifies as perpetually 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, and (c) the change in estimated value of third party trusts held for the benefit of, but not managed by, the Diocese. Use of the investment income from the assets under Diocese control may be unrestricted and used as the Diocese deems necessary for the purposes for which the original restricted gift was received. Currently, the Diocese considers the following factors in determining whether to appropriate or accumulate donor-restricted endowment funds:

- The duration and preservation of the fund
- The purposes of the Diocese and the donor-restricted endowment fund
- General economic conditions
- The possible effect of inflation and deflation
- The expected total return from income and the appreciation of investments
- Other resources of the Diocese
- The investment policies of the Diocese

From time to time, the fair value of assets associated with donor-restricted funds (excluding trust funds) may fall below the level that the donor requires the Diocese to retain as a fund of perpetual duration. In accordance with generally accepted accounting principles, deficiencies of this nature that are reported in unrestricted net assets were \$0 and \$0 at December 31, 2018 and 2017, respectively.

	2018				
	Endowment Funds				
	Unrestricted	Board- Designated Discretionary	Purpose Restricted	Perpetually Restricted	Total
Endowment Net Assets, Beginning of Year	\$ 3,195,982	2,813,667	417,975	2,327,790	8,755,414
Investment Income (Loss)	(303,255)	637,210	109,273	(14,509)	428,719
Realized and Unrealized Gain on Investments	(1,125,649)	--	--	--	(1,125,649)
Total Investment Gain	(1,428,904)	637,210	109,273	(14,509)	(696,930)
Contributions	--	583,118	336,959	--	920,077
Appropriation of Endowment Assets for Expenditure	(202,935)	(1,119,433)	(66,723)	--	(1,389,091)
Endowment Assets, End of Year	\$ 1,564,143	2,914,562	797,484	2,313,281	7,589,470
	2017				
	Endowment Funds				
	Unrestricted	Board- Designated Discretionary	Purpose Restricted	Perpetually Restricted	Total
Endowment Net Assets, Beginning of Year	\$ 2,480,824	2,792,362	425,396	2,316,606	8,015,188
Investment Income	(151,343)	290,748	98,633	11,184	249,222
Realized and Unrealized Gain on Investments	866,501	--	--	--	866,501
Total Investment Gain	715,158	290,748	98,633	11,184	1,115,723
Contributions	--	342,299	251,905	--	594,204
Appropriation of Endowment Assets for Expenditure	--	(611,742)	(357,959)	--	(969,701)
Endowment Assets, End of Year	\$ 3,195,982	2,813,667	417,975	2,327,790	8,755,414

#### 15. Subsequent Events

The Diocese has evaluated events and transactions occurring after December 31, 2018, for potential items required to be recognized or disclosed in the financial statements. Subsequent events were evaluated through June 18, 2019, the date the financial statements were available for issuance.

## EPISCOPAL DIOCESE OF IOWA

## Statement of Revenue and Expenses Compared to Budget

Year Ended December 31, 2018

	Actual	Budget	Actual Over (Under) Budget
<b>Revenue</b>			
Congregational Pledges	\$ 783,496	792,579	(9,083)
Investment Income Earned	135,620	140,000	(4,380)
Income from Trusts	28,767	30,000	(1,233)
Total Revenue	<u>947,883</u>	<u>962,579</u>	<u>(14,696)</u>
ECCC Fund Transfers	43,996	55,000	(11,004)
Theological Education Fund Transfers	32,133	32,100	33
Episcopate Fund Transfers	97,000	97,000	--
Total Revenue and Transfers	<u>1,121,012</u>	<u>1,146,679</u>	<u>(25,667)</u>
<b>Expenses</b>			
One World, One Church			
General Church Program	153,457	153,457	--
Ecumenical/Interfaith	1,000	1,000	--
Global Episcopal Mission Network	500	1,200	(700)
Episcopal Relief and Development Travel	--	700	(700)
Convention Exhibit Expenses	114	300	(186)
International Development	8,035	8,035	--
Congregational Life			
Ministries Retreat	1,173	2,500	(1,327)
Communications	5,285	5,000	285
Collaborative Ministry Partnerships	3,000	3,000	--
Transition Officer Salary and Benefits	45,480	45,480	--
Transition Officer Travel and Supplies	4,244	6,000	(1,756)
New Clergy Development	623	500	123
Older Adult MDT	267	1,000	(733)
Youth Ministry Development Team			
Young Adult Missioner - Salary	24,605	59,053	(34,448)
Young Adult Missioner - Pension	4,429	10,630	(6,201)
Young Adult Missioner - Travel	2,892	6,000	(3,108)
Young Adult Missioner - Medical/Life Insurance	11,586	27,507	(15,921)
Young Adult Program	2,483	3,000	(517)
Regional Youth Missioners - Salary	43,456	40,456	3,000
Youth Missioner - Pension	3,641	3,641	--
Youth Missioner - Travel	5,306	4,000	1,306
Youth Missioner - Medical/Life Insurance	9,756	9,756	--
Training Conferences, Workshop and Event Participation	1,095	8,000	(6,905)
Outdoor Ministries Program	13,711	13,000	711
Diocesan Events for Young People	4,769	2,000	2,769
Scholarship for Youth Events	4,600	4,500	100
Iowa Religious Media Center	2,000	2,000	--
Journey to Adulthood Sponsorship	3,500	4,000	(500)
Ministry Development Team Publicity	(48)	1,000	(1,048)
Happening	2,082	3,500	(1,418)
Diocesan Convention Attendance	2,238	3,500	(1,262)
General Convention Reserve	2,040	2,000	40

## EPISCOPAL DIOCESE OF IOWA

## Statement of Revenue and Expenses Compared to Budget

Year Ended December 31, 2018

	<u>Actual</u>	<u>Budget</u>	<u>Actual Over (Under) Budget</u>
Youth Ministry Development Team (continued)			
Youth Ministry Development Team Operation and Travel	1,764	1,500	264
Youth Ministries Library	22	500	(478)
Godly Play Development	--	1,500	(1,500)
Nursery Care at Diocesan Events	3,212	2,000	1,212
EYE Designated Fund	2,000	2,000	--
New Beginnings	915	2,000	(1,085)
Multicultural Commission			
Multicultural Commission/Anti-Racism	1,000	1,000	--
Jubilee Ministry			
St. Paul's Indian Mission			
Salary and Housing	54,558	54,558	--
Pension	9,820	9,820	--
Travel	4,545	3,000	1,545
Medical/Life Insurance	9,756	9,756	--
St. Paul's Operating Aid	10,000	10,000	--
Stewardship			
Program Training, Development and Promotion	--	1,000	(1,000)
Stewardship Commission Operation and Travel	--	1,000	(1,000)
Episcopate Function			
Bishop's Salary and Housing	118,217	115,017	3,200
Bishop's Pension	20,703	20,703	--
Bishop's Travel	25,038	20,000	5,038
Bishop's Medical/Life	8,299	8,323	(24)
Executive Assistant to the Bishop Salary and Benefits	90,594	90,934	(340)
Financial Officer Salary and Benefits	81,070	81,070	--
Financial Officer Travel	3,165	3,500	(335)
Operations Manager Salary and Benefits	39,121	40,819	(1,698)
Council of Deacons	500	500	--
Training/Conferences	1,636	1,500	136
Election Reserve	10,000	10,000	--
Administrative Function			
Diocesan Convention Expense	8,033	8,000	33
Printing - Journal and Report Booklet	2,000	2,000	--
Diocesan Administrative Assistants Salaries	22,183	22,183	--
Episcopal Life Editor Salary and Benefits	52,185	39,040	13,145
Lay Pension	1,996	1,996	--
Office Expense	36,463	33,000	3,463
Payroll Taxes	12,677	15,500	(2,823)
Audit Expense	16,779	17,000	(221)
Fidelity Bond and Insurance	16,577	23,100	(6,523)
Support Staff Medical/Life Insurance	10,745	10,745	--
Diocesan House Maintenance and Utilities	24,000	24,000	--



## EPISCOPAL DIOCESE OF IOWA

**Statement of Revenue and Expenses Compared to Budget**

Year Ended December 31, 2018

	<u>Actual</u>	<u>Budget</u>	<u>Actual Over (Under) Budget</u>
Designated Purpose Expenditures			
General Convention Expense	9,204	8,500	704
Provincial Synod Assessment	1,500	1,500	--
Lambeth Conference Travel	1,000	1,000	--
Board/Task Force/Ad Hoc Committee Expense	3,200	3,200	--
Diocesan Altar Guild	184	200	(16)
Clergy Conference/Clergy Family	4,000	4,000	--
Commission on Ministry	3,655	4,000	(345)
Total Expenses	<u>1,089,635</u>	<u>1,146,679</u>	<u>(57,044)</u>
Transfers to Other Funds	<u>(31,377)</u>	<u>--</u>	<u>(31,377)</u>
Excess of Revenue over Expenses	<u>\$ --</u>	<u>--</u>	<u>--</u>

SEE INDEPENDENT AUDITOR'S REPORT ON SUPPLEMENTARY DATA

## EPISCOPAL DIOCESE OF IOWA

## Statement of Changes in Net Assets

Year Ended December 31, 2018

	Balance 1/1/18	Revenue and Other Additions	Expenses and Other Deductions	Net Transfers Between Funds	Balance 12/31/18
Net Assets Without Donor Restrictions					
Operations Under Budget	\$ --	947,883	1,089,635	141,752	--
Undesignated Reserves					
Gifts	565	--	--	--	565
Gifts - Undesignated	100,000	500,000	--	(600,000)	--
McMullen Bequest	(5,504)	--	5	--	(5,509)
Retiree Health Insurance Fund	(15,227)	7,170	--	--	(8,057)
Undesignated Funds	998,903	--	--	50,527	1,049,430
Designated Reserves					
New Mission Development	44,696	--	46,001	38,312	37,007
Latino Ministry - ELCA/Episcopal	10,863	--	13,767	--	(2,904)
Working Capital Supplement	275,204	55,334	11	(50,527)	280,000
Journey to Adulthood	437	--	--	--	437
Land Sites	50,788	--	--	--	50,788
Campus Ministry Housing	401	--	2	--	399
General Convention Travel	19,039	--	19,039	5,958	5,958
Centerville Reserve	(7,854)	--	--	7,854	--
Winterset Reserve	26,906	--	--	(26,906)	--
Provincial Synod Travel	1,630	--	--	--	1,630
Lambeth Conference	1,701	1,079	--	5,958	8,738
Episcopate Election Reserve	152,092	17,932	--	--	170,024
Bishop's Ordination Gifts	(1,330)	--	--	--	(1,330)
Equipment Replacement and Repair	(300)	--	--	5,958	5,658
Bishop Vestments and Supplies	2,417	--	594	--	1,823
Computer Reserve	425	--	--	--	425
Lay Pastoral Training Event	1,825	--	--	--	1,825
Revival 2017	13,367	--	11,516	--	1,851
GIL - 2018 - 2019 Events	(909)	350	72,063	200,000	127,378
Revolving Fund	2,150,180	209,489	24,504	(198,957)	2,136,208
Mills House Repairs	11,029	5,532	--	11,917	28,478
Evangelism/Communication Reserve	2,905	--	--	--	2,905
L.A.N.D. Scholarship	500	--	--	--	500
L.A.N.D. Conference	5,058	--	--	--	5,058
Mission Church Meeting	289	--	--	--	289
ECCC Reserve	13,286	--	--	--	13,286
LINC Reserve	2,554	--	--	--	2,554
Sesquicentennial	(5,245)	--	--	--	(5,245)
Strengthening Spirituality	2,156	--	--	--	2,156
Marjanna Sue Smith Trust	4,972	--	--	--	4,972
Collaborative Ministry Reserve	--	1,713	--	--	1,713
Journal Printing Reserve	--	2,000	--	--	2,000
Youth Conference Reserve	266	2,000	--	--	2,266
Youth General Conference Reserve	1,123	1,431	582	--	1,972
Commission on Ministry Reserve	2,880	--	--	--	2,880
Communication Reserve	--	--	76,477	100,000	23,523
Diocesan Campaign	(67,556)	--	256,436	198,957	(125,035)
Clergy Conference/Family Reserve	2,024	--	2,024	--	--
Altekruse Bequest - E-Seminary	99,886	--	3	--	99,883
Altekruse Bequest - SW Cluster	(8,899)	--	--	--	(8,899)
Webb/Tides Grant	(12,551)	--	--	--	(12,551)
Creston Reserve	(19,911)	--	--	19,911	--
St. Paul Indian Mission Reserve	1,234	--	--	--	1,234
Nzara Reserve	895	--	895	--	--
Red Oak Reserve	19,272	53	2,350	--	16,975
Albia Reserve	8,079	32,115	1,023	(39,171)	--
One World One Church Reserve	4,007	504	1,028	1,586	5,069
Multi Cultural Comm Reserve	1,662	--	323	--	1,339
Older Adult Ministry Team	2,174	--	--	--	2,174
Episcopal Center of Camps and Conferences	258,994	62,217	16,326	(43,996)	260,889
Real Estate	142,101	--	11,777	--	130,324
Net Gain (Loss) on Investments	3,379,968	--	1,271,882	(129,133)	1,978,953
<b>Total Net Assets Without Donor Restrictions</b>	<b>\$ 7,673,467</b>	<b>1,846,802</b>	<b>2,918,263</b>	<b>(300,000)</b>	<b>6,302,006</b>

## EPISCOPAL DIOCESE OF IOWA

## Statement of Changes in Net Assets

Year Ended December 31, 2018

	Balance 1/1/18	Revenue and Other Additions	Expenses and Other Deductions	Net Transfers Between Funds	Balance 12/31/18
Net Assets With Donor Restrictions - Purpose					
Exchange Reserves					
Iowa Episcopalian	\$ (22,137)	15,304	15,321	--	(22,154)
Good Friday Offering	--	885	--	--	885
Episcopal Relief and Development	(567)	227	--	--	(340)
Bishop's Discretionary Fund	--	2,831	1,195	--	1,636
Education for Ministry	--	3,985	400	--	3,585
The Alleluia Fund	6,398	--	--	--	6,398
Iowa Creation Stewards	--	3,429	3,429	--	--
Convention Offering	(567)	5,087	--	--	4,520
Ordination Offerings	874	500	874	--	500
Swaziland Wire Transfers	--	27,347	15,770	--	11,577
Swaziland Travel	9,417	--	2,496	--	6,921
Nzara Wire Transfers	4,391	25,577	27,904	--	2,064
Nzara - Emergency Fund	5,720	--	5,689	--	31
Ecumenical Events	343	--	--	--	343
Harris Christmas Mission Project	10	--	--	--	10
Ad Campaign	3	--	--	--	3
GILEAD Diocesan Campaign	--	5,208	117	300,000	305,091
United Thank Offering	--	7,719	394	--	7,325
Theological Seminary Support	6,595	50	--	--	6,645
Multi-Peril Insurance	528	--	--	--	528
Medical/Life Insurance - Iowa	(14,395)	61,482	64,316	--	(17,229)
Dental Insurance	1,985	4,422	852	--	5,555
Diocesan Youth Choir	25	--	--	--	25
Gift Exchange	(175)	1,208	708	--	325
General	19,080	2,908	4,180	--	17,808
Special Purpose					
John Miller Scholarship	28,510	--	--	--	28,510
Morgan Estate - Grinnell College	176,823	10,406	--	--	187,229
Sudanese Theological Education Fund	600	1,000	1,000	--	600
Birthday Thank Offering	1,052	--	1,052	--	--
Bishop's Fund for Theological Education	36,462	69,879	97,795	--	8,546
E-Seminary for Theological Education	(9,500)	--	--	--	(9,500)
E-Seminary Appeal	25	--	--	--	25
Bishop's Fund for Clergy Assistance	(74,285)	14,652	11,411	--	(71,044)
Harper Scholarship Fund	2,915	--	--	--	2,915
Annuity Trust	13,906	--	--	--	13,906
Bishop's Fund for Continuing Clergy Education	133,839	24,885	2,223	--	156,501
Bishop's Crisis Relief	20,870	--	46,280	--	(25,410)
Bishop's Appeal	1,933	--	--	--	1,933
Swaziland - Shively Medical	5,576	1,000	1,000	--	5,576
Agape Café	194	24,304	6,138	--	18,360
Brechin Discretionary Fund	1,809	--	--	--	1,809
Weise Fund	854	--	--	--	854
Adult Lay Education	540	--	--	--	540
Wholly Quiet Retreat Program	276	--	--	--	276
Cathedral to Cathedral Run	588	--	--	--	588
Ministry Retreat Scholarships	2,299	1,373	1,477	--	2,195
Brechin Product Sales	239	--	--	--	239
Grant - Reconciliation & Justice	5,389	78,051	27,182	(5,000)	51,258
Grant - Campus Ministry 2017	1,783	--	--	--	1,783
Grant - Armed Forces	--	10,000	5,000	--	5,000
Grant - BCI @ Old Brick	--	--	316	5,000	4,684
Grant - Beloved Community	--	20,800	2,159	--	18,641
Pathways Retreats	--	2,082	1,202	--	880
Beloved Community Initiative	--	1,650	675	--	975
Waters of Hope	33,477	--	11,158	--	22,319
Camp for Children of Imprisoned	3,407	--	--	--	3,407
Health Reimbursement Account	(18,153)	8,868	2,719	--	(12,004)
Disaster Relief Office	12,819	986	1,654	--	12,151
Jubilee Mission Grant	40	--	10	--	30

## EPISCOPAL DIOCESE OF IOWA

## Statement of Changes in Net Assets

Year Ended December 31, 2018

	Balance 1/1/18	Revenue and Other Additions	Expenses and Other Deductions	Net Transfers Between Funds	Balance 12/31/18
Special Purpose (Continued)					
Humphrey Congregational Development	\$ 2,008	--	--	--	2,008
College Fund Clergy Youth	14,000	8,127	2,603	--	19,524
Young Adult Ministry	975	--	24	--	951
Young Adult Ministry - Trips	(915)	--	--	--	(915)
Native American Ministries	92	--	--	--	92
<b>Total Net Assets With Donor Restrictions - Purpose</b>	<b>\$ 417,975</b>	<b>446,232</b>	<b>366,723</b>	<b>300,000</b>	<b>797,484</b>
Net Assets With Donor Restrictions - Perpetual					
Gordon V. and Florence K. Smith Episcopate Fund	\$ 1,651,713	--	--	--	1,651,713
Bishop's Fund for Continuing Clergy Education	100,000	--	--	--	100,000
Council Program	92,626	--	--	--	92,626
Bishop's Fund for Clergy Assistance	69,135	--	--	--	69,135
Annuity Trust	9,922	--	--	--	9,922
Perpetual Trust	208,577	--	13,541	--	195,036
Remainder Trust	14,636	--	968	--	13,668
Bishop's Fund for Theological Education	152,470	--	--	--	152,470
Margaret William Campbell Fund for Theological Education	4,853	--	--	--	4,853
Bishop's Crisis Relief Fund	23,193	--	--	--	23,193
Frank Davis Scholarship	665	--	--	--	665
<b>Total Net Assets With Donor Restrictions - Perpetual</b>	<b>\$ 2,327,790</b>	<b>--</b>	<b>14,509</b>	<b>--</b>	<b>2,313,281</b>
<b>Total Net Assets</b>	<b>\$ 10,419,232</b>	<b>2,293,034</b>	<b>3,299,495</b>	<b>--</b>	<b>9,412,771</b>

SEE INDEPENDENT AUDITOR'S REPORT ON SUPPLEMENTARY DATA

**INSURED PROPERTY VALUES - 2018**

<b>City</b>	<b>Church</b>	<b>Insured Value</b>	<b>Insured By</b>
Algona	St. Thomas	759,900	Church Insurance Co of VT
Ames	St. John's	6,485,300	Church Insurance Co of VT
Anamosa	St. Mark's	701,200	Church Insurance Co of VT
Ankeny	St. Anne's	1,232,500	Church Insurance Co of VT
Bettendorf	St. Peter's	2,492,500	Church Insurance Co of VT
Boone	Grace	1,213,500	Church Insurance Co of VT
Burlington	Christ	7,281,100	Church Insurance Co of VT
Carroll	Trinity	633,100	Church Insurance Co of VT
Cedar Falls	St. Luke's	3,217,000	Church Insurance Co of VT
Cedar Rapids	Christ	6,964,300	Church Insurance Co of VT
Cedar Rapids	Grace	4,167,100	Church Insurance Co of VT
Chariton	St. Andrew's	544,000	Church Insurance Co of VT
Charles City	Grace	695,900	Church Insurance Co of VT
Clermont	Saviour	756,800	Church Insurance Co of VT
Clinton	Christ	3,768,900	Church Insurance Co of VT
Coralville	New Song	531,500	Church Insurance Co of VT
Council Bluffs	St. Paul's	4,458,800	Church Insurance Co of VT
Davenport	St. Alban's	1,571,600	Church Insurance Co of VT
Davenport	Trinity	19,382,500	Church Insurance Co of VT
Decorah	Grace	884,200	Church Insurance Co of VT
Denison	Trinity	930,900	Church Insurance Co of VT
Des Moines	Diocese of Iowa	2,359,200	Church Insurance Co of VT
Des Moines	St. Andrew's	3,274,200	Church Insurance Co of VT
Des Moines	St Luke's	3,980,400	Church Insurance Co of VT
Des Moines	St. Mark's	2,067,200	Church Insurance Co of VT
Des Moines	St. Paul's	8,722,400	Church Insurance Co of VT
Dubuque	St. John's	10,661,800	Church Insurance Co of VT
Durant	St. Paul's	1,262,200	Church Insurance Co of VT
Emmetsburg	Trinity	992,800	Church Insurance Co of VT
Fort Dodge	St. Mark's	3,597,700	Church Insurance Co of VT
Fort Madison	St. Luke's	1,762,200	Church Insurance Co of VT
Glenwood	St. John's	747,200	Church Insurance Co of VT
Grinnell	St. Paul's	1,293,400	Church Insurance Co of VT
Harlan	St. Paul's	1,352,700	Church Insurance Co of VT
Independence	St. James	1,487,400	Church Insurance Co of VT
Indianola	All Saints'	7,000	Church Insurance Co of VT
Iowa City	Trinity	4,580,200	Church Insurance Co of VT
Iowa Falls	St. Matthew's	911,800	Church Insurance Co of VT
Keokuk	St. John's	7,574,200	Church Insurance Co of VT
Le Mars	St. George's	997,700	Church Insurance Co of VT
Maquoketa	St. Mark's	1,082,300	Church Insurance Co of VT
Marshalltown	St. Paul's	3,276,375	Grinnell Mutual
Mason City	St. John's	4,092,700	Church Insurance Co of VT
Mt. Pleasant	St. Michael's	1,726,600	Church Insurance Co of VT
Muscatine	Trinity	3,503,700	Church Insurance Co of VT
Newton	St. Stephen's	2,305,300	Church Insurance Co of VT
Orange City	Savior	406,700	Church Insurance Co of VT
Oskaloosa	St. James'	2,124,500	Church Insurance Co of VT
Ottumwa	Trinity	4,267,500	Church Insurance Co of VT
Perry	St. Martin's	926,300	Church Insurance Co of VT
Shenandoah	St. John's	557,200	Church Insurance Co of VT
Sioux City	Calvary	1,164,300	Church Insurance Co of VT
Sioux City	St. Paul's	1,000,600	Church Insurance Co of VT
Sioux City	St. Thomas'	5,157,100	Church Insurance Co of VT
Spirit Lake	St. Alban's	1,344,600	Church Insurance Co of VT
Storm Lake	All Saints'	820,100	Church Insurance Co of VT
Waterloo	Trinity	2,744,500	Church Insurance Co of VT
Waverly	St. Andrew's	852,100	Church Insurance Co of VT
Webster City	Good Shepherd	720,800	Church Insurance Co of VT
W. Des Moines	St Timothy's	<u>2,680,000</u>	Grinnell Mutual
		167,057,575	

## Clergy Compensation - 2018

<u>Church</u>	<u>Title</u>	<u>Annual Compensation</u>	<u>Church-owned Housing Provided</u>
Algona, St. Thomas'	Pastor/Rector	\$20,400	
Ames, St. John's	Interim Priest	75,000	
Ames, St. John's	Rector	81,000	
Ankeny, St. Anne's	Rector	34,000	
Bettendorf, St. Peter's	Rector	55,848	
Burlington, Christ	Rector	60,900	
Carroll, Trinity (Trinity Cluster)	Priest in Charge	14,600	
Cedar Falls, St. Luke's	Rector	69,615	
Cedar Rapids, Christ	Interim Priest	75,000	
Cedar Rapids, Christ	Rector	72,700	Yes
Cedar Rapids, Grace	Priest in Charge	26,796	
Cedar Rapids, Grace	Priest in Charge	28,000	
Chariton, St. Andrew's	Vicar	8,700	
Clermont, Saviour	Priest in Charge	14,500	
Clinton, Christ	Rector	59,160	
Council Bluffs, St. Paul's	Consulting Priest in Partnership	9,000	
Davenport, Trinity Cathedral	Curate	56,000	
Davenport, Trinity Cathedral	Assisting Priest	37,514	
Davenport, Trinity Cathedral	Dean	73,947	
Des Moines, Diocese of Iowa	Operations Manager	26,971	
Des Moines, Diocese of Iowa	Missioner-Congregational Development/Transitions	31,120	
Des Moines, Diocese of Iowa	Missioner-Young Adults, Ministry Development & New Initiatives	59,053	
Des Moines, Diocese of Iowa	Bishop	115,017	
Des Moines, Diocese of Iowa	Communications & Reconciliation & New Initiatives	62,000	
Des Moines, St. Andrew's	Rector	36,192	
Des Moines, St. Mark's	Rector	18,000	
Des Moines, St. Luke's	Rector	59,886	
Des Moines, St. Paul's Cathedral	Dean	83,524	
Des Moines, St. Paul's Cathedral	Canon Administrator	48,140	
Dubuque, St. John's	Rector	51,000	Yes
Emmetsburg, Iowa, Trinity	Priest in Charge	6,348	
Fort Dodge, St. Mark's	Intentional Interim Rector	45,000	
Grinnell, St. Paul's	Rector	50,147	
Independence, St. James'	Priest in Residence	6,158	
Indianola, All Saints'	Priest	18,500	
Iowa City, Trinity	Rector	75,043	
Keokuk, St. John's	Priest in Charge	No Report	
Maquoketa, Iowa, St. Mark's	Rector	7,200	
Marshalltown, Iowa, St. Paul's	Priest in Partnership	36,172	
Mason City, St. John's	Priest in Charge	53,589	
Mount Pleasant, St. Michael's	Priest in Partnership	8,976	
Muscatine, Trinity	Priest in Charge	60,690	
Muscatine, Trinity	Interim Priest	75,000	
Newton, St. Stephen's	Rector	38,745	
Newton, St. Stephen's	Deacon	9,000	
Orange city, Savior	Vicar	15,000	
Oskaloosa, St. James'	Rector	17,870	
Perry, St. Martin's	Priest	16,800	
Perry, St. Martin's	Priest	12,915	
Shenandoah, St. John's	Priest in Partnership	27,279	
Sioux City, St. Paul's Indian Mission	Bishop's Vicar	54,558	
Sioux City, St. Thomas'	Pastor	32,178	
Spirit Lake, St. Alban's	Priest in Charge	53,200	
Storm Lake, All Saints'	Priest in Charge	34,071	
Waterloo, Trinity	Priest in Charge	53,589	
Waverly, St. Andrew's	Priest	5,160	
West Des Moines, St. Timothy's	Rector	88,721	

## Lay Compensation – 2018

<u>Church</u>	<u>Position</u>	<u>2018 Compensation</u>
Ames, St. John's	Christian Formation Director	\$ 19,232
Ames, St. John's	ISU Chaplain	10,500
Ames, St. John's	Music Director and Organist	24,600
Ames, St. John's	Nursery Staff	1,627
Ames, St. John's	Nursery Staff	323
Ames, St. John's	Nursery Staff	1,331
Ames, St. John's	Secretary	31,753
Ankeny, St. Anne's	Janitor	3,300
Ankeny, St. Anne's	Music Director	10,920
Ankeny, St. Anne's	Secretary	2,084
Bettendorf, St. Peter's	Administrative Assistant	1,392
Bettendorf, St. Peter's	Administrative Assistant	7,540
Bettendorf, St. Peter's	Music Director	14,100
Burlington, Christ	Executive Assistant	13,400
Burlington, Christ	Organist	12,876
Burlington, Christ	Sexton	5,302
Cedar Falls, St. Luke's		No Report
Cedar Rapids, Christ	Administrative Support	826
Cedar Rapids, Christ	Administrative Support	910
Cedar Rapids, Christ	Administrative Support	630
Cedar Rapids, Christ	Director of Music	9,947
Cedar Rapids, Christ	Director of Music	1,320
Cedar Rapids, Christ	Office Manager	23,400
Cedar Rapids, Grace	Nursery Attendant	44
Cedar Rapids, Grace	Organist	3,241
Cedar Rapids, Grace	Sexton/Secretary	10,075
Clinton, Christ	Janitorial Service	3,120
Clinton, Christ	Nursery	780
Clinton, Christ	Organist	3,975
Clinton, Christ	Secretary	9,072
Clinton, Christ	Treasurer	3,710
Coralville, New Song	Music Director	7,631
Coralville, New Song	Office Administrator	4,434
Coralville, New Song	Office Administrator	16,138
Davenport, Trinity Cathedral	Music Director	47,294
Davenport, Trinity Cathedral	Office Manager & Building & Grounds Manager	56,087
Des Moines, Diocese of Iowa	Comptroller	58,091
Des Moines, Diocese of Iowa	Diocesan Assistant	22,183
Des Moines, Diocese of Iowa	Executive Assistant to the Bishop	58,091
Des Moines, Diocese of Iowa	Youth Missioner	43,456
Des Moines, St. Andrew's	Administrator	18,200
Des Moines, St. Andrew's	Custodian	18,960
Des Moines, St. Andrew's	Music Director	13,390
Des Moines, St. Luke's	Administrative Assistant	33,680
Des Moines, St. Luke's	Organist	11,700
Des Moines, St. Paul's Cathedral	Assistant to the Dean	20,549
Des Moines, St. Paul's Cathedral	Bookkeeper	13,880
Des Moines, St. Paul's Cathedral	Choir Master	13,553
Des Moines, St. Paul's Cathedral	Organist	25,203
Des Moines, St. Paul's Cathedral	Sexton	13,689
Dubuque, St. John's	Organist	2,869
Dubuque, St. John's	Parish Administrator & Stewardship Consultant	24,681
Durant, St. Paul's	Organist	2,700
Durant, St. Paul's	Secretary	784
Fort Dodge, St. Mark's	Bookkeeper	6,063
Fort Dodge, St. Mark's	Bookkeeper	3,419
Fort Dodge, St. Mark's	Custodian	5,422
Fort Dodge, St. Mark's	Music Director	10,307
Fort Dodge, St. Mark's	Nursery Attendant	767
Fort Dodge, St. Mark's	Secretary	17,482
Grinnell, St. Paul's	Janitor	2,249

## Lay Compensation – 2018 (cont)

Independence, St. James'	Organist	480
Iowa City, Trinity	Financial Administrator	22,027
Iowa City, Trinity	Financial Administrator	1,796
Iowa City, Trinity	Minister of Music	48,758
Iowa City, Trinity	Nursery Staff	863
Iowa City, Trinity	Nursery Staff	505
Iowa City, Trinity	Nursery Staff	269
Iowa City, Trinity	Nursery Staff	190
Iowa City, Trinity	Office Assistant	15,453
Iowa City, Trinity	Office Assistant	2,271
Iowa City, Trinity	Parish Life Coordinator	47,367
Iowa City, Trinity	Sexton	28,557
Keokuk, St. John's	Maintenance	9,040
Keokuk, St. John's	Secretary	4,532
Marshalltown, St. Paul's	Daycare	220
Marshalltown, St. Paul's	Daycare	725
Marshalltown, St. Paul's	Organist	4,378
Marshalltown, St. Paul's	Organist	1,050
Marshalltown, St. Paul's	Parish Secretary	19,134
Marshalltown, St. Paul's	Sexton	10,886
Marshalltown, St. Paul's	Sexton	937
Mason City, St. John's	Minister of Music	5,750
Mason City, St. John's	Parish Administrator	18,478
Muscatine, Trinity	Administrative Assistant	864
Muscatine, Trinity	Administrative Assistant	4,863
Muscatine, Trinity	Bookkeeper	1,648
Muscatine, Trinity	Organist/Choir Director	7,762
Muscatine, Trinity	Temp Office Assistant	240
Newton, St. Stephen's	Bookkeeper	1,080
Newton, St. Stephen's	Organist	5,800
Newton, St. Stephen's	Secretary	3,420
Newton, St. Stephen's	Sexton	3,075
Newton, St. Stephen's	Sexton	754
Oskaloosa, St. James	Secretary	1,315
Ottumwa, Trinity	Organist	1,350
Ottumwa, Trinity	Organist	1,735
Ottumwa, Trinity	Sexton	2,183
Perry, St. Martin's	Organist	2,535
Perry, St. Martin's	Secretary	7,510
Sioux City, St. Thomas'	Office Manager	10,413
Sioux City, St. Thomas'	Organist	4,800
Spirit Lake, St. Alban's	Secretary	10,008
Storm Lake, All Saints'	Organist	2,400
Waterloo, Trinity	Organist	8,900
Waterloo, Trinity	Parish Administrator	15,503
Waterloo, Trinity	Sexton	419
Waterloo, Trinity	Sexton	37
Waterloo, Trinity	Sexton	102
Waterloo, Trinity	Sexton	574
West Des Moines, St. Timothy's		No Report



**Payments of Stewardship Share – 2018**

<u>CITY</u>	<u>CHURCH</u>	<u>2018 ASK</u>	<u>2018 PLEDGE</u>	<u>2018 RECEIVED</u>	<u>UNDER (OVER)</u>
Algona	St. Thomas	2,943	3,600	3,600	0
Ames	St. John's	53,918	53,918	53,918	0
Anamosa	St. Mark's	500	1,500	1,500	0
Ankeny	St. Anne's	14,988	6,505	6,507	(1)
Bettendorf	St. Peter's	17,384	17,384	17,384	0
Boone	Grace	550	550	610	(60)
Burlington	Christ	20,408	20,408	20,408	0
Carroll	Trinity	500	1,000	1,000	0
Cedar Falls	St. Luke's	35,993	35,993	35,993	0
Cedar Rapids	Christ	51,772	51,772	51,772	0
Cedar Rapids	Grace	7,434	7,434	7,434	0
Chariton	St. Andrew's	3,392	3,392	3,392	0
Charles City	Grace	2,171	2,171	2,171	0
Clermont	Saviour	1,792		1,792	(1,792)
Clinton	Christ	788	788	788	0
Coralville	New Song	21,067	21,067	21,067	0
Council Bluffs	St. Paul's	3,689	3,690	4,314	(624)
Davenport	St. Alban's	7,201	6,743	6,743	0
Davenport	Trinity	111,133	88,906	88,906	0
Decorah	Grace	6,765	6,765	6,765	0
Denison	Trinity	550	550	458	92
Des Moines	St. Andrew's	32,586	32,586	32,586	0
Des Moines	St. Luke's	30,913	14,448	14,448	0
Des Moines	St. Mark's	5,423	3,500	3,500	0
Des Moines	St. Paul's	67,466	67,466	67,466	0
Dubuque	St. John's	10,117	10,117	9,947	170
Durant	St. Paul's	5,795	5,795	5,795	0
Emmetsburg	Trinity	2,490	2,490	2,490	0
Fort Dodge	St. Mark's	27,919	27,919	27,919	0
Fort Madison	St. Luke's	4,400	4,800	4,800	0
Glenwood	St. John's	709	709	709	0
Grinnell	St. Paul's	4,686	4,686	4,686	0
Harlan	St. Paul's	550	300	300	0
Independence	St. James	2,693	2,500	2,500	0
Indianola	All Saints'	1,970	1,970	1,970	0
Iowa City	Trinity	91,935	63,700	76,200	(12,500)
Iowa Falls	St. Matthew's	3,795	3,795	3,795	0
Keokuk	St. John's	11,432	6,600	6,600	0
Le Mars	St. George's	500		343	(343)
Maquoketa	St. Mark's	2,916	1,200	2,200	(1,000)
Marshalltown	St. Paul's	12,565	12,565	12,522	43
Mason City	St. John's	17,251	17,251	17,251	0
Mount Pleasant	St. Michael's	5,126	4,200	4,200	0
Muscatine	Trinity	16,429	16,429	16,429	0
Newton	St. Stephen's	6,149	7,590	7,329	261
Orange City	Savior	1,187	600	600	0
Oskaloosa	St. James'	9,909	9,909	9,909	0
Ottumwa	Trinity	10,751	5,000	4,993	7
Perry	St. Martin's	8,081	5,500	5,500	0
Shenandoah	St. John's	550	550	550	0
Sioux City	Calvary	1,904	1,920	1,920	0
Sioux City	St. Paul's	2,842	2,584	2,584	0
Sioux City	St. Thomas'	18,145	9,740	9,727	13
Spirit Lake	St. Alban's	8,525	8,525	8,525	0
Storm Lake	AllSaints'	2,288	2,288	2,288	0
Waterloo	Trinity	13,164	13,164	13,164	0
Waverly	St. Andrew's	5,532	2,800	2,800	0
Webster City	Good Shepherd	7,660	7,660	7,660	0
West Des Moines	St. Timothy's	55,779	48,000	50,769	(2,769)
<b>TOTAL</b>		<b>877,070</b>	<b>764,992</b>	<b>783,496</b>	<b>(18,503)</b>

## Congregational Stewardship Share Pledges- 2019

<u>City</u>	<u>Church</u>	<u>Stewardship Share</u>	<u>Pledge</u>	<u>Under/(Over)</u>
Algona	St. Thomas	3,237	4,008	771
Ames	St. John's	53,965	53,965	-
Anamosa	St. Mark's	500	1,500	1,000
Ankeny	St Anne's	16,487	5,733	(10,754)
Bettendorf	St Peter's	17,935	14,206	(3,729)
Boone	Grace	550	550	-
Burlington	Christ	22,449	20,408	(2,041)
Carroll	Trinity	550	550	-
Cedar Falls	St. Luke's	34,009	34,009	-
Cedar Rapids	Christ	47,715	47,715	-
Cedar Rapids	Grace	8,177	8,177	-
Chariton	St Andrew's	3,731	4,000	269
Charles City	Grace	2,388	2,388	-
Clermont	Saviour	1,971	-	(1,971)
Clinton	Christ	867	12,581	11,714
Coralville	New Song	22,545	22,545	-
Council Bluffs	St Paul's	4,058	4,058	-
Davenport	St Alban's	7,921	7,417	(504)
Davenport	Trinity	122,246	97,796	(24,450)
Decorah	Grace	6,970	5,500	(1,470)
Denison	Trinity	605	605	-
Des Moines	St. Andrew's	31,515	31,515	-
Des Moines	St Luke's	32,199	15,903	(16,296)
Des Moines	St. Mark's	5,965	3,520	(2,445)
Des Moines	St. Paul's	74,213	74,213	-
Dubuque	St John's	9,007	9,007	-
Durant	St Paul's	6,375	6,375	-
Emmetsburg	Trinity	2,739	2,739	-
Fort Dodge	St. Mark's	30,711	30,711	-
Fort Madison	St Luke's	4,388	4,560	172
Glenwood	St John's	724	724	-
Grinnell	St. Paul's	5,155	5,200	45
Harlan	St Paul's	605	300	(305)
Independence	St James	2,885	2,885	-
Indianola	All Saints'	2,167	2,167	-
Iowa City	Trinity	92,415	74,061	(18,354)
Iowa Falls	St. Matthew's	4,175	4,175	-
Keokuk	St. John's	11,921	7,200	(4,721)
LeMars	St George's	500	300	(200)
Maquoketa	St Mark's	3,208	1,200	(2,008)
Marshalltown	St Paul's	13,822	13,822	-
Mason City	St John's	12,164	12,164	-
Mount Pleasant	St Michael's	5,639	4,200	(1,439)
Muscatine	Trinity	18,072	18,072	-
Newton	St Stephen's	6,764	6,764	-
Orange City	Savior	500	500	-
Oskaloosa	St James'	10,900	10,900	-
Ottumwa	Trinity	11,826	5,000	(6,826)
Perry	St. Martin's	8,332	5,500	(2,832)
Shenandoah	St John's	605	605	-
Sioux City	Calvary	1,323	1,325	2
Sioux City	St Paul's	3,126	500	(2,626)
Sioux City	St Thomas'	15,246	9,500	(5,746)
Spirit Lake	St Alban's	8,366	8,366	-
Storm Lake	All Saints'	1,588	1,588	-
Waterloo	Trinity	14,480	14,480	-
Waverly	St Andrew's	5,592	1,000	(4,592)
Webster City	Good Shepherd	6,579	6,579	-
West Des Moines	St Timothy's	61,357	49,000	(12,357)
<b>TOTAL</b>		<b>906,024</b>	<b>794,331</b>	<b>(111,693)</b>



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15 August 2019

Beloved sisters and brothers in Christ,

It seems appropriate to anticipate 2020 as a year for perfect vision; and to grasp a clearer sight as to God's mission for us, and especially for us among our neighbors for the sake of God's love. It is an especially good year to look back and see more clearly, in hindsight, the way God has been directing us. That is one way of expressing this year's Convention theme of "Finding the Simple Way," which will ultimately consider the attached draft budget for 2020.

I am excited to outline some of what we can expect in the coming year. It is a year with four major points of mission interest at the Diocesan level. We will focus on small church vitality and gather an International Summit on the subject. Engaging All Disciples continues in 2020 through the ongoing coaching in ministry cohorts, and we maintain our emphasis on encouraging young adults in leadership and mission through hosting the Iowa stage of the Tri-Companion Pilgrimage for Young Adults in the fall. We will also launch, at Convention, details about a team training process for congregational development called Faithful Innovations, aimed at impacting medium size and larger congregations. 2020 will also be the first of many years in which grants from your generous donations to the Diocesan Campaign, GILEAD, will begin to roll out in response to your creative ministry and mission ideas.

Over all, the diocesan budget provides for the infrastructure of mission and ministry of the Diocese: the Episcopacy, Young Adults, Youth and Children, Congregational Transition and Life, Congregational Ministry Formation and Development, Administrative and Financial support. Stability at this regular level through your congregational participation in the common Stewardship Share helps us to be able to launch out and be bold and inspired in these new mission endeavors.

You will notice some additions to this year's budget from last year. These reflect the administration assistance required for the smooth administrating of GILEAD grants, as well as the receiving, acknowledging and tracking of GILEAD contributions. There is also a new item in the diocesan budget in assuming a portion of support for The Beloved Community Initiative, which up to now has been launched solely on grants provided by The Episcopal Church Genesis project.

It is an honor to present this budget for your consideration. It is our collective statement of commitment to God's work with us along the Way of Love. I believe that this is a year to celebrate how clearly God has been guiding and inspiring us these past few years, and to catch a more perfect vision of what can be done in God's precious Name. You are a generous, loving people for whom I give God thanks, and with whom it is a special privilege to serve.

In Christ's love and peace,

A handwritten signature in black ink, appearing to read 'Alan Scarfe'. The signature is written in a cursive style with a long horizontal line extending from the left side.

The Rt. Rev. Alan Scarfe  
Bishop

## 2020 Proposed Budget

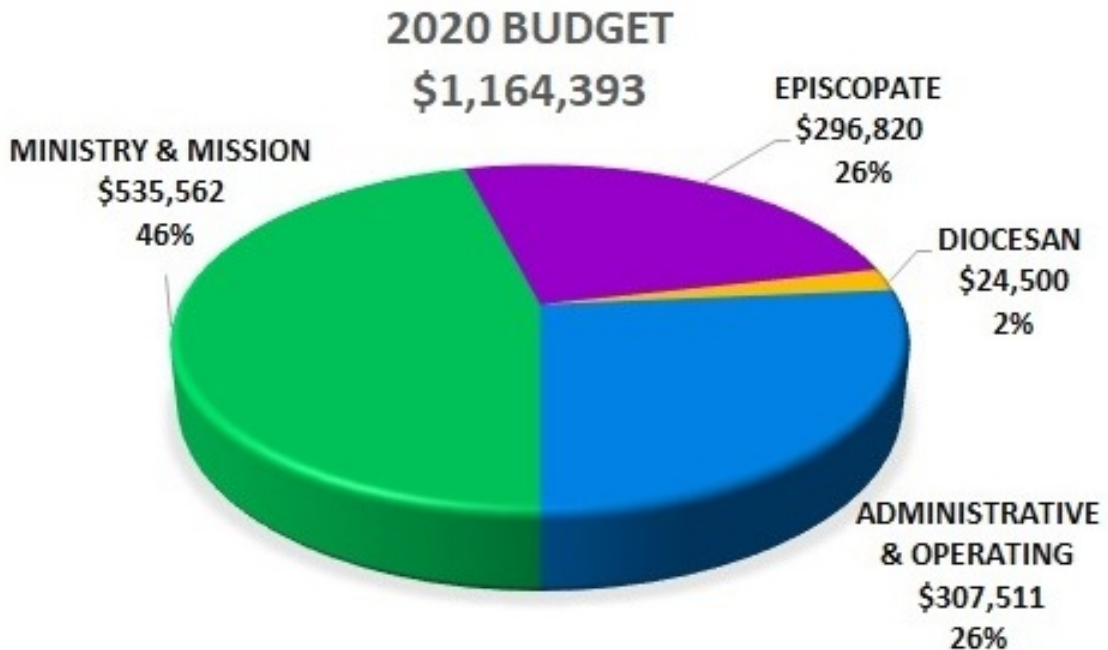
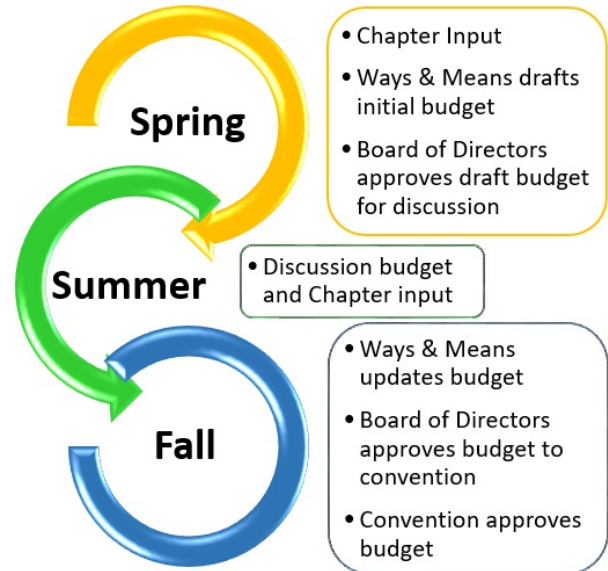
September 14, 2019

**The Diocesan Budget** is a statement of our hopes and plans for the coming year for our common ministry as the Episcopal Diocese of Iowa, “in mission with Christ through each and all.”

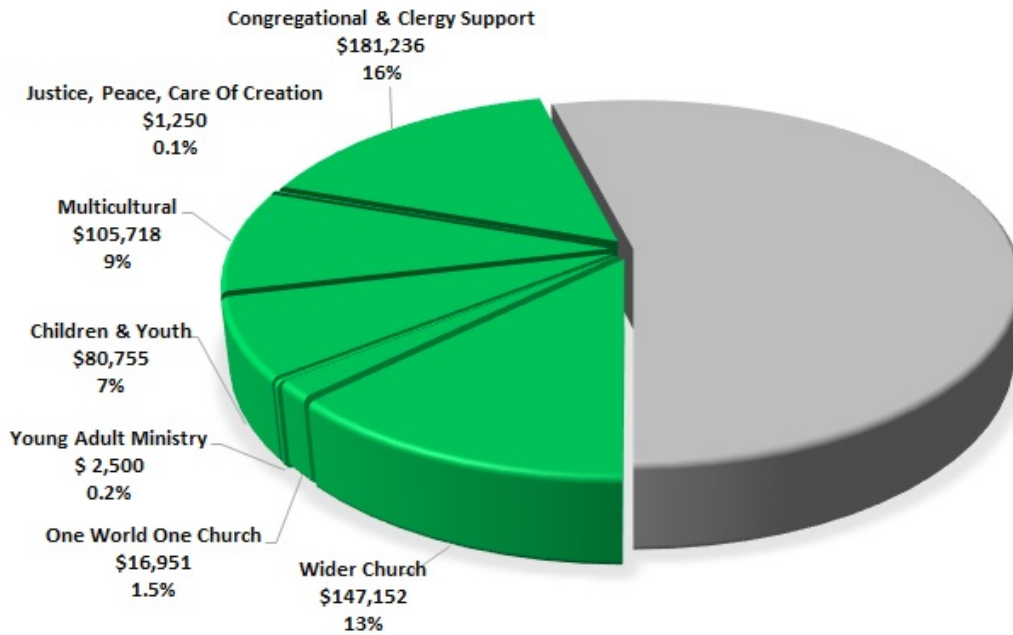
After considering input from Chapter meetings and reviewing the earlier draft budget, the Ways & Means Committee and the Board of Directors are presenting this proposed budget to delegates for approval at Diocesan Convention in October.

Changes from the previous draft budget include adjustments to health insurance costs from the estimated 6% increase to 5.8%, a slight increase in staff salaries to 1.2%, an adjustment to employer payroll tax, and a few additional tweaks to create a balanced budget.

## Diocesan Budget Process

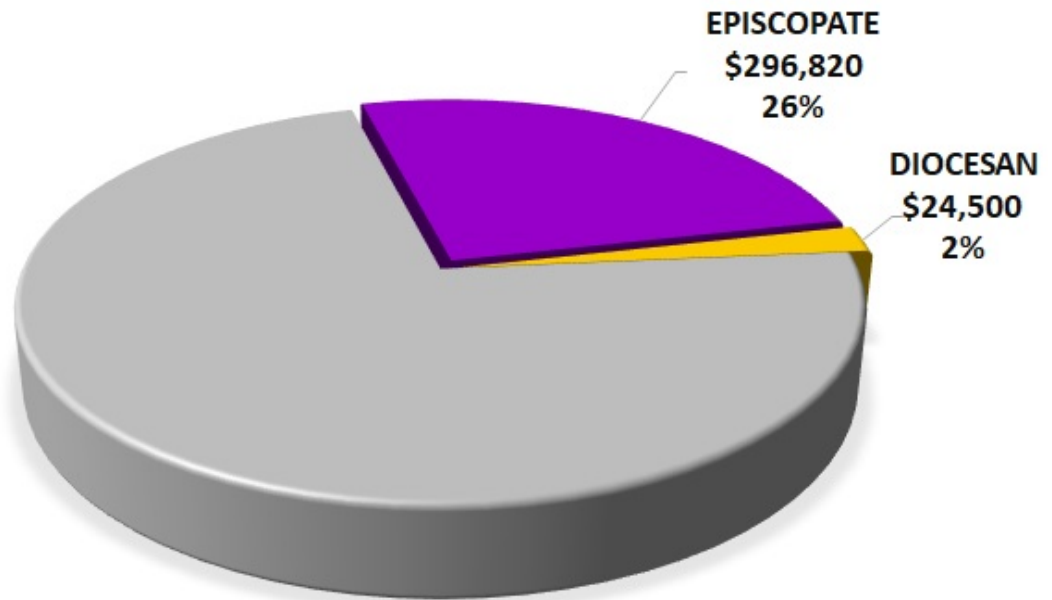


## MINISTRY & MISSION

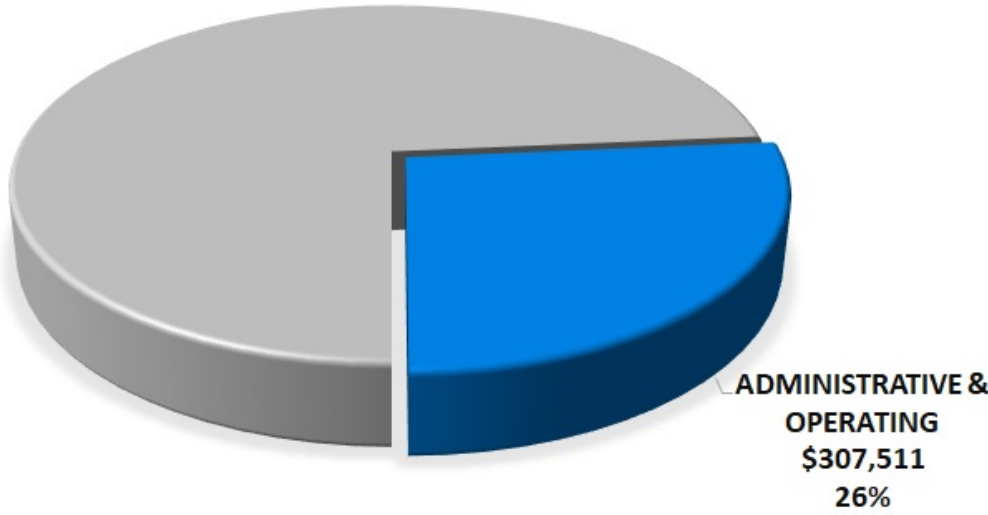


**Ministry & Mission** is the section of the budget that reflects many of the important ministries we do for our neighbors and ourselves. By combining our resources and efforts we are able to do some things better together than each can do alone.

We provide for our common ministry through the Episcopate. The Bishop is our chief, visible and spiritual link to each other, and gives us important links to the greater Episcopal Church, its traditions and its mission.



**The Diocesan section** of the budget provides for those things we must do as a Diocese. We must hold an annual convention and have Diocesan governing boards, commissions and committees that provide oversight and organization for our work together.

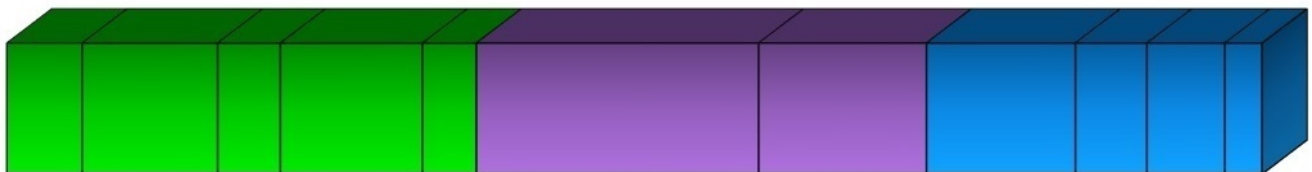


The final section of the operating budget provides the grease that makes much of our shared work possible. These expenses include financial and administrative personnel; office expenses; utilities and maintenance; the expense of an annual audit; and property and liability insurance.

**Salaries and benefits** for Diocesan personnel are listed in the sections of the budget that most closely relate to their job. This budget has a 1.2% cost of living increase for all salaries, except for the Bishop's, whose salary is increased 5% to bring it closer in line with similar dioceses. The 2020 health insurance rates are an average 5.8% increase over 2019.

Personnel changes reflected in this budget include the Missioner for Transitions & Congregational Development, the Missioner for Administration, and the Financial Assistant. Since GILEAD is a large part of descriptions for both the Missioner for Administration and the Financial Assistant, 50% of these two positions will be funded in the budget, and 50% will be funded from GILEAD.

**Personnel**  
**\$712,290**  
**61%**



**Ministry & Mission**

- Youth Missioner (0.75 FTE) - \$43,205
- St. Paul's Indian Mission (1 FTE) - \$77,718
- Missioner-Transitions/Cong Dev (0.5 FTE) - \$36,000
- Missioner-Communication/Reconciliation/ New Initiatives (1 FTE) - \$73,951
- Missioner-Administration (1 FTE) - \$31,085\*

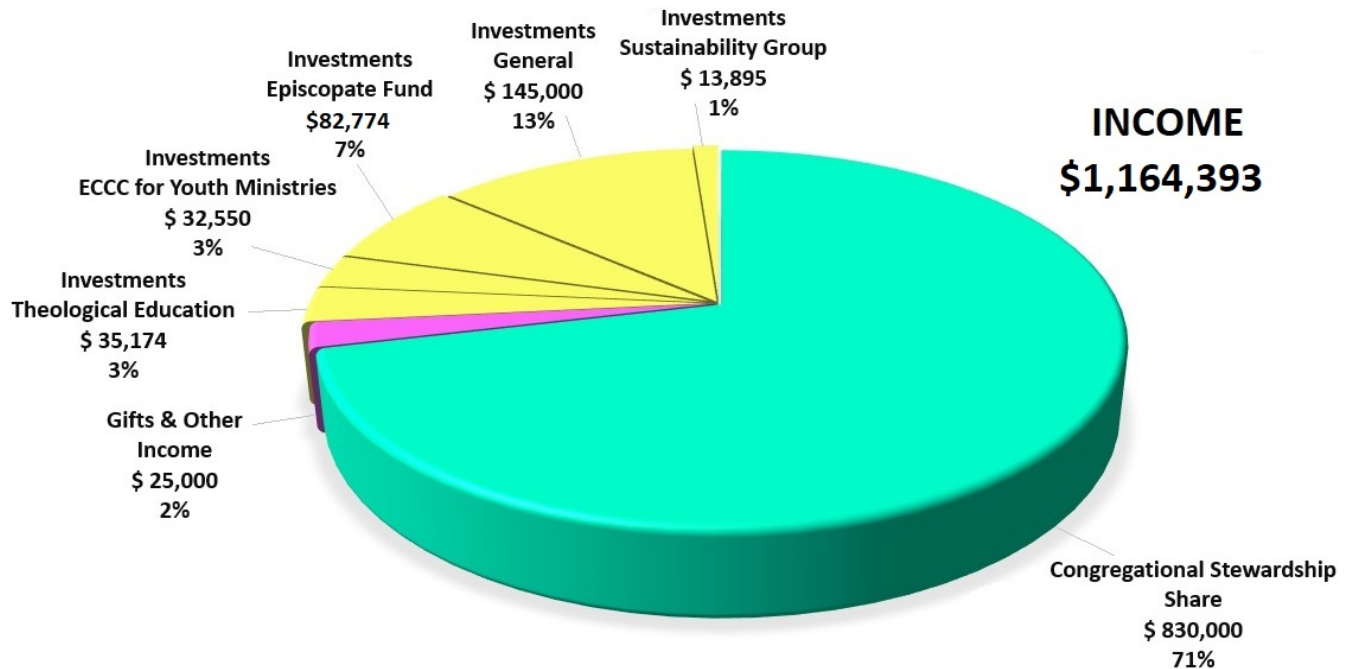
**Episcopate**

- Bishop (1 FTE) - \$162,381
- Exec. Asst. to the Bishop (1 FTE) - \$96,439

**Administrative & Operating**

- Comptroller (1 FTE) - \$81,990
- Operations Manager (0.5 FTE) - \$40,931
- Diocesan Assistant (0.6 FTE) - \$44,657
- Financial Assistant (0.75 FTE) - \$20,933\*

\*50% of position is funded from Budget and 50% is funded from GILEAD



The greatest portion of income is Stewardship Share support received from congregations (71%), followed by income from diocesan investments (27%). Gifts and other undesignated income make up the remaining 2% of this budget. Income from investments is drawn at 5%, with the exception of the Sustainability Group, which is a 2% draw.

A new [Diocesan Funding Policy and Stewardship Share Formula](#) effective for 2020 has been adopted by the Ways & Means Committee and approved by the Board of Directors. The annual Stewardship Share of each congregation shall be determined by the following formula:

1. Determine the Base Amount that is the lesser of either the previous year operating income, or the average of operating income of the previous three years, as reported in the annual parochial reports.
2. A deduction of \$35,000 is allowed for congregations supporting a full-time cleric. This deduction will be pro-rated for congregations that support a cleric less than full-time, with a minimum deduction of \$3,000 for congregations without stipendiary clergy.
3. The Stewardship Share shall be the Base Amount less the clergy deduction, multiplied by the applicable percent from the following table:

<u>Base Amount</u>	<u>Percent</u>
\$0-\$50,000	11%
\$50,000-\$100,000	13%
\$100,000-\$200,000	15%
\$200,000 & above	17%

Congregations making a commitment less than the full Stewardship Share shall make a written appeal to the Ways & Means Committee for a reduction in their Stewardship Share. The appeal should include an explanation and financial reports, and sent by mail to Ways & Means Committee, 225 37th Street,



Des Moines, IA 50312, or by email to [diocese@iowaepiscopal.org](mailto:diocese@iowaepiscopal.org). The Ways & Means Committee may request to meet with representatives of the congregations in considering the appeal.

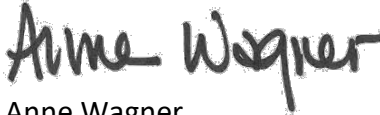
Congregations that do not agree to their Stewardship Share, even after appeal, may not be eligible for grants, loans, or other special funding through the Diocese of Iowa.

Ways & Means will review this formula at least every three years.

**We believe this budget is an expression of our common ministry** and challenges us to provide the resources that make this ministry possible. For questions or comments about the 2020 Proposed Budget, contact us at 515-277-6165 or [diocese@iowaepiscopal.org](mailto:diocese@iowaepiscopal.org).

In Christ,

  
William H. Smith, Jr.  
Treasurer

  
Anne Wagner  
Comptroller

**EPISCOPAL DIOCESE OF IOWA**  
**PROPOSED 2020 BUDGET TO CONVENTION**

9/14/2019

	<b>2020 PROPOSED BUDGET</b>	2019 REVISED BUDGET	2019 APPROVED BUDGET	2018 ACTUAL AUDITED
<b>1 INCOME</b>				
2 Congregational Stewardship Share	<b>830,000</b>	795,586	794,000	783,496
3 Multi-cultural/Racial Reconciliation Donations		7,500	7,500	
4 Gifts & Other Income	<b>25,000</b>	30,000	30,000	28,767
5 Theological Education Investment Income	<b>35,174</b>	33,000	33,000	32,133
6 ECCC Income for Youth Ministries	<b>32,550</b>	41,550	41,550	43,996
7 Episcopate Fund Investment Income	<b>82,774</b>	95,800	95,800	97,000
8 General Investment Income	<b>145,000</b>	147,000	147,000	135,620
9 Sustainability Group Investment Income	<b>13,895</b>	15,000	15,000	
<b>10 TOTAL INCOME</b>	<b><u>1,164,393</u></b>	<u>1,165,436</u>	<u>1,163,850</u>	<u>1,121,012</u>
<b>11</b>				
<b>12 EXPENSES</b>				
<b>13 MINISTRY &amp; MISSION</b>				
<b>14 WIDER CHURCH</b>				
15 Pledge to Episcopal Church	<b>145,652</b>	148,575	147,000	153,457
16 Province VI Synod Assessment	<b>1,500</b>	1,500	1,500	1,500
<b>17 TOTAL WIDER CHURCH</b>	<b><u>147,152</u></b>	<u>150,075</u>	<u>148,500</u>	<u>154,957</u>
<b>18</b>				
<b>19 ONE WORLD ONE CHURCH</b>				
20 Ecumenical & Interfaith	<b>1,500</b>	1,500	1,500	1,000
21 Global Episcopal Mission Network	<b>2,000</b>	1,700	1,700	500
22 Episcopal Relief and Development Travel		600	600	0
23 Convention Exhibit Expenses	<b>300</b>	300	300	114
24 Swaziland Neighborhood Care Points	<b>5,000</b>	5,000	5,000	
25 Sustainable Development Goals - Mini-Grants	<b>8,151</b>	8,158	8,147	8,035
<b>26 TOTAL ONE WORLD ONE CHURCH</b>	<b><u>16,951</u></b>	<u>17,258</u>	<u>17,247</u>	<u>9,649</u>
<b>27</b>				
<b>28 YOUNG ADULT MINISTRY</b>				
<b>29 Young Adult Missioner</b>				
30 Salary, SS Offset & Housing		34,000	34,000	24,605
31 Pension		6,120	6,120	4,429
32 Health/Life Insurance		9,090	9,090	11,586
33 Travel/Conferences		3,000	3,000	2,892
34 Young Adult Ministry Development	<b>2,500</b>	2,500	2,500	2,483
<b>35 TOTAL YOUNG ADULT MINISTRY</b>	<b><u>2,500</u></b>	<u>54,710</u>	<u>54,710</u>	<u>45,996</u>
<b>36</b>				
<b>37 CHILDREN &amp; YOUTH MINISTRY</b>				
<b>38 Youth Missioner (0.75 FTE)</b>				
39 Salary	<b>39,422</b>	39,000	39,000	43,456
40 Pension	<b>3,548</b>	3,510	3,510	3,641
41 Medical/Life Ins.	<b>235</b>	0	0	9,756
42 Travel/Conferences	<b>3,000</b>	4,000	4,000	5,306
43 Training Participation	<b>3,000</b>	5,000	5,000	1,095
44 Outdoor Ministries Program	<b>13,000</b>	13,000	13,000	13,711
45 Diocesan Events for Young People	<b>2,000</b>	2,000	2,000	4,769
46 Scholarship for Youth Events	<b>4,500</b>	4,500	4,500	4,600
47 Journey to Adulthood (J2A) Sponsorship		0	0	3,500
48 Publicity	<b>200</b>	200	200	(48)
49 Happening	<b>2,000</b>	2,500	2,500	2,082

**EPISCOPAL DIOCESE OF IOWA**  
**PROPOSED 2020 BUDGET TO CONVENTION**

9/14/2019

	<b>2020 PROPOSED BUDGET</b>	2019 REVISED BUDGET	2019 APROVED BUDGET	2018 ACTUAL AUDITED	
50	Diocesan Convention - Youth Delegates	2,500	2,500	2,500	2,238
51	General Convention Reserve	2,000	2,000	2,000	2,040
52	Operation & Travel	1,500	1,500	1,500	1,764
53	Youth Ministries Library	150	150	150	22
54	Godly Play Development	200	200	200	0
55	New Beginnings	1,500	2,000	2,000	915
56	Episcopal Youth Event (EYE) Reserve	2,000	2,000	2,000	2,000
57	<i>Subtotal Youth Program (46-62)</i>	<b>37,550</b>			
58	TOTAL CHILDREN & YOUTH	<b>80,755</b>	84,060	84,060	100,849
59					
60	MULTICULTURAL				
61	St. Paul's Indian Mission (1 FTE)				
62	Salary & Housing	56,802	56,195	56,195	54,558
63	Pension	10,224	10,115	10,115	9,820
64	Health/Life Insurance	10,692	10,104	10,104	9,756
65	Travel/Conferences	3,000	3,000	3,000	4,545
66	St. Paul's Indian Mission Operating Aid	10,000	10,000	10,000	10,000
67	Racial Reconciliation	15,000	8,000	8,000	1,000
68	TOTAL MULTICULTURAL	<b>105,718</b>	97,414	97,414	89,679
69					
70	JUSTICE, PEACE, CARE OF CREATION				
71	Creation Stewards	500	1,000	1,000	
72	Faith in Action	500	1,000	1,000	
73	Chemical Dependency Program	250	310	310	0
74	TOTAL JUSTICE, PEACE, CARE OF CREATION	<b>1,250</b>	2,310	2,310	0
75					
76	CONGREGATIONAL & CLERGY SUPPORT				
77	Missioner-Congregational Development/Transitions (0.5 FTE)				
78	Salary	36,000	34,000	34,000	31,120
79	Pension	0	6,120	6,120	5,602
80	Health Insurance	0	9,090	9,090	8,758
81	Travel/Conferences	6,000	6,000	6,000	4,244
82	Missioner-Communication Reconciliation, New Initiatives (1 FTE)				
83	Salary	62,670	62,000	62,000	39,333
84	Pension	11,281	11,160	11,160	6,930
85	Travel/Conferences	7,500	6,000	6,000	5,922
86	Missioner-Administration (1 FTE with GILEAD covering 50%)				
87	Salary	28,303			
88	Pension	2,547			
89	Health/Life Insurance	235			
90	Travel/Conferences	3,000			
91	Communication Expenses	6,000	6,000	6,000	5,285
92	Collaborative Ministry Partnerships	3,000	4,000	4,000	3,000
93	Summer Ministry School & Retreat	2,500	2,500	2,500	1,173
94	Nursery Care at Diocesan Events	4,000	4,000	4,000	3,212
95	Iowa Religious Media Services		2,000	2,000	2,000
96	Older Adult Ministry Development Team	1,000	1,000	1,000	267
97	Stewardship	1,000	1,500	1,500	0
98	Diocesan Altar Guild	200	200	200	184

**EPISCOPAL DIOCESE OF IOWA**  
**PROPOSED 2020 BUDGET TO CONVENTION**

9/14/2019

	<b>2020 PROPOSED BUDGET</b>	2019 REVISED BUDGET	2019 APROVED BUDGET	2018 ACTUAL AUDITED
99 Council of Deacons	500	500	500	500
100 Clergy Conference/Clergy Family	4,500	4,500	4,500	4,000
101 New Clergy Development	1,000	1,000	1,000	623
102 TOTAL CONGREGATIONAL & CLERGY SUPPORT	<b>181,236</b>	161,570	161,570	122,153
103 TOTAL MINISTRY & MISSION	<b>535,562</b>	567,397	565,811	523,283
104				
105 EPISCOPATE				
106 Bishop (1 FTE)				
107 Salary & Housing	123,900	118,000	118,000	118,217
108 Pension	22,302	21,239	21,239	20,703
109 Health/Life Insurance	16,179	8,540	8,540	8,299
110 Travel/Conferences	25,000	28,000	28,000	25,038
111 Executive Assistant to the Bishop (1 FTE)				
112 Salary	60,477	59,830	59,830	58,091
113 Pension	5,443	5,385	5,385	5,228
114 Health/Life Insurance	30,519	28,628	28,628	27,275
115 Staff Travel/Conferences/Continuing Education	1,500	1,500	1,500	1,636
116 Commission on Ministry	4,000	4,000	4,000	3,655
117 Lambeth Conference Travel Reserve	2,500	2,500	2,500	1,000
118 Episcopate Election Reserve	5,000	6,000	6,000	10,000
119 TOTAL EPISCOPATE	<b>296,820</b>	283,622	283,622	279,142
120				
121 DIOCESAN				
122 Diocesan Convention Expense	9,000	10,000	10,000	8,033
123 Publishing Journal & Report Booklet	2,000	2,000	2,000	2,000
124 General Convention Deputy Travel Reserve	10,000	10,000	10,000	9,204
125 Board/Task Force/Ad-Hoc Committee Expense	3,500	3,500	3,500	3,200
126 TOTAL DIOCESAN	<b>24,500</b>	25,500	25,500	22,436
127				
128 ADMINISTRATIVE & OPERATING				
129 Comptroller (1 FTE)				
130 Salary	60,477	59,830	59,830	58,091
131 Pension	5,443	5,385	5,385	5,228
132 Health/Life Insurance	16,070	18,415	18,415	17,751
133 Travel/Conferences	3,000	3,500	3,500	3,164
134 Operations Manager (0.5 FTE)				
135 Salary	28,077	27,777	27,777	26,971
136 Pension	5,054	5,000	5,000	4,855
137 Health/Life Insurance	7,800	7,492	7,492	7,295
138 Diocesan Assistant (0.6 FTE)				
139 Salary	23,095	22,848	22,848	22,183
140 Pension	2,079	2,055	2,055	1,996
141 Health/Life Insurance	19,483	18,415	18,415	10,745
142 Financial Assistant (0.75 FTE with GILEAD covering 50%)				
143 Salary	14,192			
144 Pension	1,277			
145 Health/Life Insurance	5,464			
146 Employer Payroll Tax	17,000	13,200	13,200	12,677
147 Office Expense	38,000	40,000	40,000	36,463

**EPISCOPAL DIOCESE OF IOWA**  
**PROPOSED 2020 BUDGET TO CONVENTION**

9/14/2019

	<b>2020 PROPOSED BUDGET</b>	2019 REVISED BUDGET	2019 APROVED BUDGET	2018 ACTUAL AUDITED
148 Diocesan House Maintenance and Utilities	<b>25,000</b>	25,000	25,000	24,000
149 Audit Expense	<b>18,000</b>	18,000	18,000	16,779
150 Property/Casualty/Liability Insurance	<b>18,000</b>	22,000	22,000	16,577
151 TOTAL ADMINISTRATIVE & OPERATING	<b>307,511</b>	288,917	288,917	264,775
152 <b>TOTAL EXPENSES</b>	<b>1,164,393</b>	1,165,436	1,163,850	1,089,635
153				
154 <b>RECEIPTS OVER(UNDER) EXPENSES</b>	<b>0</b>	0	0	31,377

## Iowa Diocesan Foundation Fund:

### Description

The Iowa Diocesan Foundation Fund was established in 1959 and offers a convenient, professionally managed investment fund for the congregations of the Diocese of Iowa, and most of the special purpose funds given to the Diocese. By creating a common pool of investable funds, participants are able to invest in a well-diversified portfolio.

The Investment Policy of the Iowa Diocesan Foundation Fund establishes the investment policies and objectives of the Iowa Diocesan Foundation Fund to assist the Investment Committee and Board of Directors of the Episcopal Corporation of the Diocese of Iowa and the Investment Consultant in effectively supervising, monitoring and evaluating investments (<http://iowaepiscopal.org/investment-policy.html>).

State Street Global Advisors, as part of the Endowment Management Solutions Program of the Episcopal Church Foundation, was retained in 2015 for asset management of the Foundation Fund, at the direction of the Board of Directors of the Episcopal Corporation of the Diocese of Iowa. Trustee fees are based on the market value of all investments in the trust at the end of each quarter.

The Foundation Fund is divided into participating units, thus providing a means of preserving the identity of each participating organization. Participating shares in the Foundation are acquired in direct proportion to the size of each fund or gift.

Valuation dates are fixed by the Foundation as the last day of each month, and distributions of 5%, based on a rolling three-year average of the portfolio balance, less operating and management expenses, are made to participating organizations. This distribution is made monthly, and participants may reinvest their earnings if they chose to do so. Units may be issued or withdrawn on the first day of each month, provided that such request to make investment or withdrawal has been received by check or in writing at the office of the Diocese of Iowa prior to the valuation date on which investment or withdrawal is to take place.

Performance Reports and Audited financial statements are available for review at the Diocesan Office.

### The Iowa Diocesan Foundation Fund Statistical History

Year	<u>Number of</u>		<u>Unit</u>	<u>Income from</u>		<u>*Total</u>
	<u>Participating</u>	<u>Equity of</u>		<u>Interest &amp;</u>	<u>Expenses</u>	
	<u>Units</u>	<u>Participants</u>	<u>Value</u>	<u>Dividends</u>		<u>Return</u>
2009	168,211	8,538,974	\$50.76	\$218,428	\$46,837	20.1%
2010	165,105	8,984,997	\$54.42	\$188,837	\$46,102	13.7%
2011	164,727	8,875,390	\$53.88	\$186,071	\$53,183	3.4%
2012	166,427	9,625,234	\$57.83	\$209,386	\$51,449	12.9%
2013	168,103	11,788,954	\$70.13	\$221,595	\$58,366	21.3%
2014	168,453	12,986,251	\$77.09	\$246,903	\$63,772	13.4%
2015	165,861	11,835,830	\$71.36	\$88,578	\$77,263	-0.9%
2016	164,882	11,944,544	\$72.44	\$52,240	\$79,202	6.6%
2017	166,690	13,408,350	\$80.44	\$43,287	\$80,451	15.2%
2018	165,302	13,839,332	\$69.75	\$37,085	\$79,278	-9.20%

*\*Total Return includes income and appreciation, before fees*

**EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA  
IOWA DIOCESAN FOUNDATION FUND**

**Des Moines, Iowa**

**FINANCIAL STATEMENTS**

**December 31, 2018 and 2017**

**(With Independent Auditor's Report Thereon)**

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

Des Moines, Iowa

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INDEPENDENT AUDITOR'S REPORT

Board of Directors  
Episcopal Corporation of the Diocese of Iowa -  
Iowa Diocesan Foundation Fund  
Des Moines, Iowa

*Report on the Financial Statements*

We have audited the accompanying financial statements of the Episcopal Corporation of the Diocese of Iowa - Iowa Diocesan Foundation Fund, which comprise the Statements of Financial Position, including the Schedule of Investments in Securities as of December 31, 2018 and 2017, and the related Statements of Activities, Changes in Net Assets, and Cash Flows for the years then ended, and the related notes to the financial statements.

*Management's Responsibility for the Financial Statements*

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

*Auditor's Responsibility*

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits 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 from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



*Opinion*

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Episcopal Corporation of the Diocese of Iowa - Iowa Diocesan Foundation Fund as of December 31, 2018 and 2017, and the results of its activities, changes in net assets, and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

*Meriwether Wilson and Company PLLC*  
MERIWETHER, WILSON AND COMPANY, PLLC  
Certified Public Accountants

June 14, 2019  
West Des Moines, Iowa

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

**Statements of Financial Position**

December 31,

	<u>2018</u>	<u>2017</u>
<b>Current Assets</b>		
Cash and Cash Equivalents	\$ 42,492	48,455
Investments	11,609,081	13,477,496
Total Assets	<u>11,651,573</u>	<u>13,525,951</u>
<b>Current Liabilities</b>		
Income Distributable to Participants	28,996	30,140
Accounts Payable - Corporation	61,500	54,261
Accounts Payable	31,643	33,200
Total Liabilities	<u>122,139</u>	<u>117,601</u>
<b>Net Assets</b>	<u>\$ 11,529,434</u>	<u>13,408,350</u>
Units Outstanding	165,302	166,690
Stated Unit Value	\$69.7476982	80.4388386

The accompanying notes are an integral part of these financial statements.

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

**Statements of Activities**

Years Ended December 31,

	<u>2018</u>	<u>2017</u>
<b>Investment Income</b>		
Interest	\$ 4,519	339
Dividends	31,582	41,833
Other	984	1,115
	<u>37,085</u>	<u>43,287</u>
<b>Expenses</b>		
Trustee's Fees	71,961	74,371
Professional Fees and Other Expenses	7,317	6,080
	<u>79,278</u>	<u>80,451</u>
 Net Investment Income (Loss)	 <u>(42,193)</u>	 <u>(37,164)</u>
<b>Net Realized and Unrealized Gain (Loss) on Investments</b>		
Net Realized Gain (Loss) on Sale of Investments	524,255	105,787
Change in Net Unrealized Gain or Loss on Investments	<u>(1,630,042)</u>	<u>1,849,149</u>
Net Gain (Loss) on Investments	<u>(1,105,787)</u>	<u>1,954,936</u>
 Increase (Decrease) in Net Assets Resulting from Operations	 <u><u>\$ (1,147,980)</u></u>	 <u><u>1,917,772</u></u>

The accompanying notes are an integral part of these financial statements.

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

**Statements of Changes in Net Assets**

Years Ended December 31,

	2018		2017	
	Number of Units	Amount	Number of Units	Amount
<b>Increase in Net Assets from Operations</b>				
Net Investment Income (Loss)		\$ (42,193)		(37,164)
Net Realized Gain (Loss) on Sale of Investments		524,255		105,787
Change in Net Unrealized Gain or Loss on Investments		<u>(1,630,042)</u>		<u>1,849,149</u>
Net Increase (Decrease) in Net Assets Resulting from Operations - Unrestricted		<u>(1,147,980)</u>		<u>1,917,772</u>
Distributions to Participants of Net Investment Income		<u>(602,297)</u>		<u>(605,133)</u>
<b>Participant Transactions</b>				
Participant's Purchase of Net Units	7,726	593,838	4,203	336,877
Paid to Participants on Units Redeemed	<u>(9,114)</u>	<u>(722,477)</u>	<u>(2,395)</u>	<u>(185,710)</u>
	<u>(1,388)</u>	<u>(128,639)</u>	<u>1,808</u>	<u>151,167</u>
Net Increase (Decrease)	(1,388)	(1,878,916)	1,808	1,463,806
<b>Net Assets at Beginning of Year - Unrestricted</b>	<u>166,690</u>	<u>13,408,350</u>	<u>164,882</u>	<u>11,944,544</u>
<b>Net Assets at End of Year - Unrestricted</b>	<u><u>165,302</u></u>	<u><u>\$ 11,529,434</u></u>	<u><u>166,690</u></u>	<u><u>13,408,350</u></u>

The accompanying notes are an integral part of these financial statements.

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

**Statements of Cash Flows**

Years Ended December 31,

	<u>2018</u>	<u>2017</u>
<b>Cash Flows from Operating Activities</b>		
Increase (Decrease) in Net Assets Resulting from Operations	\$ (1,147,980)	1,917,772
Adjustments to Reconcile Increase in Net Assets to Net Cash Provided by Operating Activities		
Gain on Sale of Investments	(524,255)	(105,787)
Change in Net Unrealized Gain or Loss on Investments	1,630,042	(1,849,149)
Increase (Decrease) in Income Distributable to Participants	(1,144)	1,331
Increase (Decrease) in Due to Corporation	7,239	6,000
Increase (Decrease) in Accounts Payable	(1,557)	1,994
Total Adjustments	<u>1,110,325</u>	<u>(1,945,611)</u>
Net Cash Provided (Used) by Operating Activities	<u>(37,655)</u>	<u>(27,839)</u>
<b>Cash Flows from Investing Activities</b>		
Purchase of Investments	(2,860,929)	(2,039,114)
Proceeds from Sale of Investments	3,623,557	2,539,812
Net Cash Provided by Investing Activities	<u>762,628</u>	<u>500,698</u>
<b>Cash Flows from Financing Activities</b>		
Net Distributions to Participants of Net Investment Income	(602,297)	(605,133)
Participants Purchase of Net Units	593,838	336,877
Participants Redemption of Net Units	(722,477)	(185,710)
Net Cash Used by Financing Activities	<u>(730,936)</u>	<u>(453,966)</u>
<b>Net Increase (Decrease) in Cash and Cash Equivalents</b>	(5,963)	18,893
<b>Cash - Beginning of Year</b>	<u>48,455</u>	<u>29,562</u>
<b>Cash - End of Year</b>	<u>\$ 42,492</u>	<u>48,455</u>

The accompanying notes are an integral part of these financial statements.

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

**Schedule of Investments in Securities**

December 31,

	2018		2017	
	Shares	Fair Value	Shares	Fair Value
<b>Cash/Money Market - 5.40% (0.79% in 2017)</b>		<u>\$ 626,608</u>		<u>107,017</u>
<b>Mutual Funds, Common Trust Funds, and Exchange Traded Funds - 94.60% (99.21% in 2017)</b>				
Large Cap Equities - 32.41% (31.16% in 2017)				
DJ-UBS Roll Select Commodity Index SM	95,995	569,154	103,727	697,665
S & P 500 Common Trust Fund	23,809	<u>2,990,547</u>	26,398	<u>3,468,780</u>
		<u>3,559,701</u>		<u>4,166,445</u>
Small/Mid Cap Equities - 10.71% (10.99% in 2017)				
S & P Mid Cap Lending CTF	10,703	536,954	14,239	803,577
Small Cap Index Plus CTF 9	19,248	<u>639,080</u>	18,100	<u>665,371</u>
		<u>1,176,034</u>		<u>1,468,948</u>
International Equities - 26.58% (31.51% in 2017)				
Active Intl Small Cap SL CTF	9,523	420,528	14,628	814,724
Daily Active Emerging Mkt CTF	27,985	812,847	--	--
Daily Active Emerging Mkt	--	--	36,580	1,236,498
International Alpha Select CTF	104,060	<u>1,685,559</u>	110,189	<u>2,162,028</u>
		<u>2,918,934</u>		<u>4,213,250</u>
REIT - 4.22% (4.99% in 2017)				
REIT Index CTF	5,657	231,368	7,741	330,286
SPDR Dow Jones Intl Real Estate Fund	6,572	<u>232,255</u>	8,335	<u>337,484</u>
		<u>463,623</u>		<u>667,770</u>
Fixed Income - 26.08% (21.35% in 2017)				
High Yield CTF	51,645	706,550	47,736	672,164
Passive Bond Market SL CTF	73,005	1,152,817	78,710	1,242,276
TCW Emerging Markets Income Fund I	47,959	367,843	62,633	534,883
Treasury Inflation Protected Securities Index CTF Fund	44,388	<u>636,971</u>	27,838	<u>404,743</u>
		<u>2,864,181</u>		<u>2,854,066</u>
Total Mutual Funds		<u>10,982,473</u>		<u>13,370,479</u>
<b>Total - 100.00% (Cost \$11,052,324 (\$11,290,696 in 2017))</b>		<u><u>\$ 11,609,081</u></u>		<u><u>13,477,496</u></u>

The accompanying notes are an integral part of these financial statements.

EPISCOPAL CORPORATION OF THE DIOCESE OF IOWA -  
IOWA DIOCESAN FOUNDATION FUND

**Notes to Financial Statements**

December 31, 2018 and 2017

**1. Nature of Organization**

The Iowa Diocesan Foundation Fund is a common investment fund available to all parishes, missions, and other organizations of the Episcopal Corporation of the Diocese of Iowa. State Street Global Advisors of Boston, Massachusetts, holds the Foundation Fund's investment assets in trust and executes transactions therein at the direction of the Board of Directors of the Episcopal Corporation of the Diocese of Iowa. Trustee fees are based on the market value of all investments in the trust at the end of each quarter.

The Fund is divided into participating units which are valued as of the monthly valuation dates set by the Foundation, which is generally the last day of each month. Units may be issued or withdrawn on the first day of each month. Monthly distributions of 5%, based on a rolling three-year average of the portfolio balance, less operating and management expenses, are made to participating organizations. The accounting records of the Fund are maintained on the accrual basis.

**2. Summary of Significant Accounting Policies**

**Cash**

For the purposes of the Statements of Cash Flows, cash and cash equivalents are comprised of cash on hand, savings, and checking accounts.

**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 reported amounts of assets and liabilities and 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. Actual results could differ from those estimates.

**Security Valuation**

All investments in securities are recorded at their estimated fair value as described in Note 3.

**Fair Value of Financial Instruments**

The Foundation records financial assets and liabilities using a fair value hierarchy, which prioritizes the inputs used in measuring fair value into three broad levels as follows:

Level 1 – Quoted prices (unadjusted) are available in active markets for identical assets or liabilities as of the reporting date.

Level 2 – Pricing inputs are quoted prices for similar assets and liabilities in active markets or inputs that are observable for the asset or liability, either directly or indirectly through market corroboration, for substantially the full term of the financial instrument.

Level 3 – Significant inputs to pricing have little or no observability as of the reporting date. The types of assets or liabilities included in Level 3 are those with inputs requiring significant management judgment or estimation, such as complex and subjective models and forecasts used to determine fair value.

As required by FASB ASC 820-10, financial assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The Foundation's assessment of the significance of a specific input to the fair value measurement requires judgment and may affect the valuation of fair value assets and liabilities and their placement within the fair value hierarchy levels.

The following methods and assumptions were used by the Foundation in estimating the fair value of its financial instruments.

Investments in marketable securities, including certain mutual funds, and cash equivalents are measured at fair value based on quoted prices in active markets and as such are categorized as Level 1.

Investments in certain mutual funds are measured at fair value based on the underlying unit value reported at net asset value, which is based on the fair value of the underlying investments held by the funds less their liabilities.

The carrying amounts of cash, receivables, accounts payable, accrued expenses, and other liabilities approximate their fair values due to the short-term maturities of these financial instruments.

#### Other

The Foundation records security transactions based on a trade date. Dividend income is recognized on the ex-dividend date and interest income is recognized on an accrual basis. Discounts and premiums on securities purchased are accreted and amortized over the lives of the respective securities. Withholding taxes on foreign dividends have been provided for in accordance with the Foundation's understanding of the applicable country's tax rules and rates.

#### Reclassifications

Certain reclassifications to the 2017 financial statements have been made to conform to the 2018 presentation.

### 3. Fair Value Measurements

The following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at December 31, 2018 and 2017.

#### *Cash/Money Market Funds*

The fair value of the cash or money market funds is generally based on quoted prices in active markets.

#### *Common Trust Funds and Exchange Traded Funds*

The fair value of the Common Trust Funds and Exchange Traded Funds is based on the underlying unit value reported at the net asset values (NAV). The NAV is based on the fair value of the underlying investments held by the funds less their liabilities. These accounts consist of portfolios of assets as follows:

**Large Cap Equities** – This asset class is generally comprised of investments in approximately 500 leading companies in leading industries in the U.S. market with approximately 75% coverage of the U.S. Stock market capitalization. Stocks typically carry more risk than fixed income investment options but have the potential for higher returns over longer time periods. All investment options in this category have the potential to lose value.

**Small/Mid Cap Equities** – This asset class is generally comprised of investments in approximately 400 U.S. mid-cap securities as well as the Russell 2000 Index. Small/Mid Cap stocks typically carry more risk than larger U.S. equity investments but have the potential for higher returns. All investment options in this category have the potential to lose value.

**International Equities** – This asset class is generally comprised of investments in stocks or shares of ownership in companies with their principal place of business or office outside the United States. International investments often carry more risk than U.S. equity investments but may have the potential for higher returns. All investment options in this category have the potential to lose value.

**REITs** – This asset class is generally comprised of investment funds that seek a return that approximates the Dow Jones U.S. Select REIT Index and the SPDR Dow Jones International Real Estate ETF. These funds are managed using a "passive" or "indexing" approach which attempts to replicate the performance of those previously mentioned indexes. These investments include real estate holdings, both domestic and international and as such often carry significant risk. All investment options in this category have the potential to lose value.



**Fixed Income** - This asset class is generally comprised of various types of fixed income investments, typically bonds or U.S. Treasury securities. Although typically lower in risk than investment options that invest solely in equities, all investment options in this category have the potential to lose value.

The preceding methods described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Foundation believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The Foundation's assets which are measured at fair value on a recurring basis as of December 31, 2018 and 2017 are presented below based on the fair value hierarchy levels:

	Total	Quoted Prices in Active Markets (Level 1)	Significant Other Observable Inputs (Level 2)	Unobservable Inputs (Level 3)
December 31, 2018				
Cash/Money Market Funds	\$ 626,608	626,608	--	--
Assets Measured at Net Asset Value	10,982,473			
Total	<u>\$ 11,609,081</u>			
December 31, 2017				
Cash/Money Market Funds	\$ 107,017	107,017	--	--
Assets Measured at Net Asset Value	13,370,479			
Total	<u>\$ 13,477,496</u>			

The Foundation's investment funds may participate in an agency securities lending program sponsored by State Street Bank and Trust Company for the purpose of lending securities and investing the collateral in a collateral reinvestment fund. None of the collateral pools are FDIC insured bank deposits or otherwise guaranteed. Investors may lose money by participating in the lending program and through investments in the collateral pool.

#### 4. Investments

Investments are presented in the financial statements at their aggregate market values. The change in the difference between the market value and the cost of investments is reflected in the statements as the change in unrealized gain or loss on investments. All investments are held for trading purposes.

Investments are comprised of the following as of December 31:

	2018		2017	
	Cost	Market Value	Cost	Market Value
Cash/Money Market Funds	\$ 626,608	626,608	107,017	107,017
Fixed Income Funds	2,776,405	2,864,181	2,663,374	2,854,066
Equity Based Funds/Securities	7,155,105	7,654,669	7,873,843	9,848,643
REIT Funds	494,206	463,623	646,462	667,770
	<u>\$ 11,052,324</u>	<u>11,609,081</u>	<u>11,290,696</u>	<u>13,477,496</u>

Gross realized gains and losses on investments for the years ended December 31 were as follows:

	2018			2017		
	Gross Sales Proceeds	Realized Gains	Realized Losses	Gross Sales Proceeds	Realized Gains	Realized Losses
Fixed Income Funds	\$ 399,997	25,140	(2,490)	900,081	31,348	--
Equity Funds/Securities	2,967,575	524,266	(22,792)	1,506,127	131,805	(62,449)
REIT Funds	255,985	3,501	(3,370)	133,604	7,175	(2,092)
	<u>\$ 3,623,557</u>	<u>552,907</u>	<u>(28,652)</u>	<u>2,539,812</u>	<u>170,328</u>	<u>(64,541)</u>

Gross unrealized gains and losses on investments for the years ended December 31 were as follows:

	2018		2017	
	Unrealized Gains	Unrealized Losses	Unrealized Gains	Unrealized Losses
Fixed Income Funds	\$ 102,246	(14,470)	190,692	--
Equity Based Funds/Securities	760,487	(260,923)	1,975,800	--
REIT Funds	5,221	(35,804)	28,867	(7,559)
	<u>\$ 867,954</u>	<u>(311,197)</u>	<u>2,195,359</u>	<u>(7,559)</u>

5. **Net Asset Value (NAV) per Share**

The plan has disclosed the category, fair value, redemption frequency, and redemption notice period of those assets whose fair value is estimated using the net asset value per share as of December 31, 2018 and 2017. The following tables set forth a summary of the investments with a reported NAV.

Fair Value Estimated Using Net Asset Value  
per Share - December 31, 2018

	Fair Value	Unfunded Commitment	Redemption Frequency	Redemption Restrictions	Redemption Notice Period
Common Trust and Exchange Traded Funds					
Large Cap Equities	\$ 3,559,701	--	Immediate	None	3-4 Days
Small/Mid Cap Equities	1,176,034	--	Immediate	None	3-4 Days
International Equities	2,918,934	--	Immediate	None	3-4 Days
REITs	463,623	--	Immediate	None	3-4 Days
Fixed Income	2,864,181	--	Immediate	None	3-4 Days
	<u>\$ 10,982,473</u>	<u>--</u>			

Fair Value Estimated Using Net Asset Value  
per Share - December 31, 2017

	Fair Value	Unfunded Commitment	Redemption Frequency	Redemption Restrictions	Redemption Notice Period
Common Trust and Exchange Traded Funds					
Large Cap Equities	\$ 4,166,445	--	Immediate	None	3-4 Days
Small/Mid Cap Equities	1,468,948	--	Immediate	None	3-4 Days
International Equities	4,213,250	--	Immediate	None	3-4 Days
REITs	667,770	--	Immediate	None	3-4 Days
Fixed Income	2,854,066	--	Immediate	None	3-4 Days
	<u>\$ 13,370,479</u>	<u>--</u>			

## 6. Principal Risks

The Foundation in the normal course of business makes investments in financial instruments and derivatives where the risk of potential loss exists due to changes in the market (market risk), or failure or inability of the counterparty to a transaction to perform (credit and counterparty risk). See below for a detailed description of how the Foundation's investment advisor State Street Global Advisors (SSgA) manages the principal risks.

### *Risk Management*

Risk is monitored and managed in several ways at SSgA. First, SSgA has an independent risk team that reviews the portfolio and provides reporting on the contribution to risk of the various exposures in the portfolio. Second, the process involves several asset class committee meetings, portfolio management meetings, and a "politics and policy" team meeting that ultimately culminates in a final "alpha meeting" where the quantitative and qualitative aspects of SSgA's investment approach are synthesized into final investment decisions. This process also plays an important role in risk management.

### *Exposure Analytics - Compliance with Risk Guidelines*

Asset class exposures are bounded by each client's customized investment objectives and constraints. SSgA codifies these limits and benchmarks into its trading/rebalancing system. Within this system, systematic pre- and post-trade tolerance checks are run to verify compliance with portfolio guidelines and policy targets or bands. Active decisions are made by overweighting attractive asset classes and underweighting less attractive ones, relative to benchmark. Maximum exposures from a benchmark are dependent upon the desired level of aggressiveness in a mandate definition.

### *Operational Risk Management*

SSgA manages for risk at several levels. At the investment-team level, the portfolio managers conduct ongoing reviews of the portfolios they manage. Every portfolio has risk management guidelines accompanied by appropriate escalation procedures should the portfolios move outside of various constraints (i.e., sector). Other tasks specific to their risk-management process include, but are not limited to, the following:

- Understanding thoroughly investment guidelines/restrictions with regard to client agreements/fund mandates and managing portfolios in accordance with those mandates.
- Following SSgA Investment Policies articulated by the investment team's respective global asset class Chief Investment Officer.
- Constructing portfolios with risk characteristics consistent to their investment strategies and parameters.
- Complying with the SSgA Code of Ethics, which governs personal trading activity.

SSGA's Investment Risk Management Team provides additional portfolio oversight. The Investment Risk Management Team is composed of risk managers globally, most of whom have advanced degrees in quantitative methods, economics, and finance.

The Investment Risk Management Team's role is one of both control and support. Control in that they seek to confirm that risks are in line with client/management tolerances. Support in that they determine whether portfolio managers are taking risks where they have the greatest expertise. They work both to ensure that risk contributions are consistent with return expectations and to highlight intentional and unintentional exposures. The Investment Risk Management Team also monitors portfolio risk exposures to ensure they are consistent with client guidelines and with the intended alpha generation targets. Attention is focused on where SSgA has risk, how much risk it has, and whether the risk exposures are consistent with its views and client objectives. Risk exposure is monitored in relation to the client's Investment Management Agreement.

The Investment Risk Management Team works closely with the portfolio managers and Information Technology Team to identify, calculate, and produce portfolio-level analytics for SSgA's equity, currency, cash, and fixed-income portfolios. The underlying analytics system integrates risk monitoring, risk measurement, and risk management into the investment process.

Finally, risk profiles of lead equity, currency, investment solutions, cash, and fixed income strategies are reviewed monthly by the Investment Committee.

7. **Investment Advisory Fees**

The Foundation receives investment management and advisory services under agreements with SSgA and the Episcopal Church Foundation. The Foundation incurred fees totaling \$71,961 during the year ended December 31, 2018 (\$74,371 in 2017). During the year ended December 31, 2018 \$19,297 (\$19,262 in 2017) of the total fees were paid to the Episcopal Church Foundation, an affiliate of the Foundation.

8. **Related Party Transactions**

The Convention of the Diocese of Iowa elects and provides guidance to the Board of Directors of the Episcopal Corporation of the Diocese of Iowa, which in turn, functions as the trustee to the Iowa Diocesan Foundation Fund.

The Episcopal Corporation of the Diocese of Iowa (the Corporation) owned 83,813 and 85,438 participating units in the Fund at December 31, 2018 and 2017, respectively. The Corporation's total equity in the Fund at December 31, 2018 and 2017 was \$5,891,171 and \$6,906,927 respectively.

At December 31, 2018, the Iowa Diocesan Foundation Fund owed the Episcopal Corporation of the Diocese of Iowa \$78,229 (\$71,841 in 2017).

9. **Income Taxes**

The Foundation is organized exclusively for religious purposes and is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code.

10. **Financial Highlights**

The Foundation's significant financial ratios are as follows for the years ended December 31:

	<u>2018</u>	<u>2017</u>
Total Expenses to Average Net Assets	0.64%	0.63%
Net Investment Return to Average Net Assets	(9.21)%	15.13%

11. **Subsequent Events**

The Organization has evaluated events and transactions occurring after December 31, 2018 for potential items required to be recognized or disclosed in the financial statements. Subsequent events were evaluated through June 14, 2019, the date the financial statements were available for issuance.

## Bishop's Appointments/Advisory Groups:

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### **Chaplains to the Retired Clergy The Rt. Rev. Alan Scarfe**

The establishment of the Chaplains to the Retired network came out of the Church Pension Group and recognized by General Convention in 2006. Liane Nichols and Bill Moorhead have served over the past year as appointed chaplains to the retired clergy of the Diocese of Iowa. In this ministry, chaplains function partly on their own initiative following up on retired clergy but also as directed in my own pastoral references. We are very grateful for the ministry contributions of all who have served as chaplains, and welcome conversation with those who feel called to this particular pastoral service.

### **Commission on Church Property, Architecture and Allied Arts Ms. Anne Wagner, Comptroller**

This Commission serves as an advisory group on questions of church property, financing, safety, building use by outside groups, and risk management of church property. They also are responsible for oversight of the Diocesan House, closed church properties, property and liability insurance, and to review and approve Revolving Fund Loans applications that meet the criteria of the Revolving Fund Loan Policy.

During 2019 this group helped facilitate the sale of the closed church property in Red Oak; consulted with and is assisting Trinity Church in Denison on the sale of their rectory and church building.

### **Commission on Ministry (COM) The Rev. Anne Moats Williams, Chair**

The work of the Commission is outlined in the Ministry Canons of the national church as serving as an advisory group appointed by the Bishop. The Commission of Ministry (COM) met five (5) times since the last diocesan convention. We gave thanks to Spivey Knapik for service as a member of the Commission. The Commission is currently working with eight postulants seeking ordination to the priesthood, four postulants seeking ordination to the vocational diaconate, five candidates for ordination to the priesthood, and one Ministry Development Team. During the past year, Bishop Scarfe has ordained three to the priesthood.

The Commission is thankful for the work of The Rev. Canon Kathleen Milligan, our diocesan examining chaplain, Ellen Bruckner, Ex-Officio, Julianne Allaway, and the Diocesan office staff for their assistance in the work done on behalf of the Commission and in support of the formation process for ordination.

### **Council on Deacons Deacons Judith Crossett and Jeanie Smith**

At Bishop Scarfe's request, and with the results of a survey on deacon formation showing that deacons value time with other deacons, we have revived the Deacons' Council. It's still a work in progress.

We have met three times: In person on June 1, 2019 for a Deacons' Day with the Bishop at St. Paul's in Des Moines; and twice by Zoom.

Our meeting at St. Paul's Cathedral included a mutual check-in: what in our diaconal ministry would we like other deacons to pray for? We discussed meeting frequency, the role of deacons in the diocese, the name and nature of the group. The original Council was (I believe) a smaller leadership group; we are a gathering of all the deacons, so we may need a new name. The day closed with Eucharist; we had the joy of giving the dismissal as a gathering of deacons, in unison.

The two Zoom meetings have been spent discussing Shane Claiborne's [book Irresistible Revolution](#) and planning for diocesan convention. At the Bishop's request, discussion following Shane

Claiborne's talk at Convention will be led by deacons, who have formulated the questions for Indaba-style discussion in small table groups.

The vision for the Deacons' Gathering is evolving. The purposes we see now are as follows:

- Mutual support, prayer, sharing of concerns (and griefs); a safe place
- Regular contact from convener/leader of group to each, but especially to those no longer active
- Find what needs for ongoing education we have and ways to supply them
- Mentoring of deacons in formation and newly ordained
- Coordinate diaconal service to the diocese

All these will get modified by the group, because we should be attuned to ourselves and our needs, and meeting them. The rest of our work is for the world; the gathering is for us.

### **Priests in New/Transitional Situations (PINTS)**

**The Rev. Steve Godfrey, convener**

We continue to support recently ordained priests and pastors leading congregations in transition, including during the first two years of a new settled ministry, through Priests and Pastors in New/Transitional Situations (PINTS). PINTS meets about five times per year, for half a day, sharing a meal and conversation with the bishop and one another about how things are going and particular challenges, addressing critical incidents in structured small group reflection, and learning together about areas of particular concern to pastors in new and transitional calls. This effort follows in the footsteps of former "Fresh Start" and interim priest gatherings. We strive to address intentionally some areas where clergy who are newly ordained or new to the diocese may need instruction or orientation, like administration, youth ministry, pastoral offices, and liturgical planning. Clergy appreciate the opportunity to form and deepen collegial relationships that can help sustain ministry for years into the future. PINTS currently includes 20 priests and is convened by the Rev. Steve Godfrey.

### **Professional Development Leaves**

**The Rt. Rev. Alan Scarfe**

Professional Development Leaves are for the purpose of encouraging professional growth and an increased competence of the clergy and lay professionals, which will contribute to the life and work of the Church in the Diocese of Iowa. Leaves may be granted for regular study at any academic level in a college, university or seminary, for research in a specific area of the Church's life, or for other creative work, which will benefit the Church in the Diocese of Iowa.

In 2018, clergy continuing education funds were awarded to Susanne Watson Epting; and to St. Luke's-Cedar Falls for supply coverage in sabbatical of rector.

## **Engaging All Disciples (2018-19)**

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### **Engaging All Disciples - Events**

**Traci Ruhland Petty, coordinator**

Building on the momentum started from the Revivals in 2017 and Growing Iowa Leaders' days in 2018, churches have continued to meet in their same clusters and spend a day together, the focus of 2019 being "Engaging All Disciples". By the time of convention, 19 of the 21 clusters will have had their Engaging All Disciples day – a day of reflection, celebration, and/or shared collaboration and engagement with each other. The days have looked different in every cluster of churches, and have included topics like: learning how to invite others, sharing our faith and stories, touring historical places, celebrating the power of prayer, discerning our gifts, and mapping the congregants and ministry areas in the community. It has been exciting to see what each day brings, and the fellowship and spirit that is present at these days and in the lives of participants. Thank you to the participants, hosts, speakers, facilitators, and everyone who has made these days possible.

**Engaging All Disciples - Cohorts**  
**Ellen Bruckner, coordinator**

As the Diocese moves through these three years from Revival 2017 to Growing Iowa Leaders (2018) to, Engaging All Disciples in 2019/2020, there is a focus on being sent into the world to share the Good News of God's love for all. The Cohorts, or learning communities, emerged from topics most requested during the Growing Iowa Leaders days. Seven areas of learning were identified: Engaging Our Stories; Engaging New Generations of Faith; Engaging Creative Worship; Engaging our Resources; Engaging Our Neighbors; Engaging Discipleship; and Engaging Justice through Public Policy.

Each of these topics formed a Cohort which began its journey at the Summer Ministries School and Retreat in June. Each of the Cohorts has a coach who is coaching each of the participants in the development and carrying out of a ministry plan in their own place.

Coaches check in at least once a month (for eight months) with their Cohort and the participants in the Cohort work on their ministry project in their own time and place. We hope to be developing communities of practice with each of these cohorts – networks of people focused on similar topics of ministry and building a relationship that will support each of them. People do know there are others with similar calls across the diocese and are now in touch with some of these practitioners through the Cohort. Cohorts will meet formally until May 2020. We are grateful for the generous gift to the Engaging All Disciples work that has allowed for these cohorts to happen.

**Diocesan Officers:**

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**Chancellor**  
**Mr. William Graham**

The chancellor has consulted with the Bishop, his staff and other individuals on matters of legal significance, as appropriate, and has assisted with legal matters, as necessary.

**Historiographer**  
Position currently vacant

**Diocesan Coordinators/Resources:**

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**Altar Guild**  
**Ms. Martha Hippee, Director**

The Diocesan Altar Guild Loan Closet was delighted to be able to send home with Bishop Peni of Nzara cassocks and albs that many Iowa churches had donated. Also, when Bishop Scarfe visited Nzara he took with him a large number of stoles from the Loan Closet.

The Diocesan Altar Guild was pleased to provide items for the worship space and service at the Summer Ministry School and Retreat in Grinnell, thanks to Jeanne Roland's good and indefatigable work.

The Diocesan Altar Guild ordered and prepared the chrisms oils that were distributed to the clergy following Chrism Mass during holy week.

**Office of Disaster Preparedness & Response**  
**The Rev. Holly Scherff**

The U.S. continues to see and feel the effects of global warming in 2019. The Midwest fell victim to record breaking flooding, the West coast endured ravaging fires, and as I write this, the South East is preparing for hurricane Dorian to strike.

Natural disaster's as they are called are no longer natural, or normal. They grow in intensity every year as we continue to neglect our duty of being good stewards of God's creation, and the forecast for the next several decades is heart wrenching.

In March I attended a Disaster Relief Training in Chicago sponsored by Episcopal Relief and Development. (No longer referred to as ERD). Upon my return home we were in the midst of a record-breaking flood that caused the death of thousands of cattle and hogs and the loss of grain and farmland. My training was used immediately and the best part about that is the team of Episcopal Relief and Development were with me every step of the way. The difficult issue with this particular flood is the many breaches in the levee system, which means the river goes where it wants to go. Homes remained underwater for months and are now beyond repair. Roads were completely washed away making it possible only by boat to get to homes to retrieve pets or care for surviving livestock. And now that the water has receded the challenge is even greater.

I have been in constant contact with the Fremont County Emergency Manager asking how we can help. Fortunately, a disaster brings out the generosity and compassion of many around the world. Unfortunately, there is always another disaster around the corner. All the major players concerning disaster relief were present within days and stayed for months. I waited to see who fell through the cracks of the system. For example, I was given the name of a family whose home was not affected by the flooding, but the husband was unable to get to his job because the road was gone. His job would be waiting for him once the road reopened, but that would take months. The loss of income was stressful, and aid was minimal. We, the Episcopal Diocese of Iowa, were able to help with gas and grocery gift cards.

As time goes on the needs have changed. We purchased good clean furniture and household items from a local auction house that are being stored and are available for free to those affected. The major need at present is housing. Many displaced families have been living in campers in nearby campgrounds that will be closing in early October.

As we look to the future at increasing devastation due to climate change, we must prepare ourselves and our communities. Our friends and partners at Episcopal Relief and Development have posed the question that we all need to consider. "What if we thought about disaster planning as connecting with God? Just as God remembers those who mourn, are brokenhearted and disenfranchised, we can too. Let us be intentional in remembering those who are most in need in our communities, especially during disasters and extreme weather. After all, God is in the details."

Flooding in SW Iowa was not all that happened in Iowa this year but, where I am in SW Iowa, it is what I was involved with. I apologize to those on the East side or any other part of the state that endured a disaster of any sort for not seeming to be concerned. This is where I need help. It would be wonderful to have a disaster coordinator in each of the four corners of the state. If you or someone in your congregation has a passion for such a project, for helping those that fall the cracks of the system, please contact me at [scherffh@gmail.com](mailto:scherffh@gmail.com). I would love the help. A disaster is overwhelming, emotionally and monetarily. It would be easier with a local support network.

As for recovery work, a team from Iowa traveled to the panhandle of Florida in February to help after hurricane Michael ravaged the area in October of 2018. The group worked on four properties with plumbing, electricity, painting, sheet rock, granite counter installation, trim, wallboard and door installation, fence repair, general grounds cleanup, and more. They partnered with St. Michael's Episcopal Church on Sanibel Island in Florida under the leadership of Jerry Davenport. I am grateful for their willingness to serve where and when they are needed (although going to Florida in February from Iowa does not seem like a daunting sacrifice).

The US Disaster Program, Episcopal Relief and Development, offer many resources and support that we can draw from. It is our responsibility as Christians to assist those on the margins, those that no one else sees.

Christ has no body now on earth but yours; no feet but yours. Yours are the eyes through which the compassion of Christ must look out on the world. Yours are the feet with which He is to go about doing good. Yours are the hands with which He is to bless His people.' We must be prepared so that we may be of the most use. Won't you please join me?



## **Jubilee Ministry**

A Jubilee Ministry Center is a congregation, an ecumenical cluster with an Episcopal presence, or an agency with connections to the Episcopal Church, already engaged in mission and ministry among and with poor and oppressed people. Each program comes out of the history of its community. The network of Jubilee Ministry Centers is coordinated by the Jubilee Ministry Office at The Episcopal Church headquarters in New York City.

The Jubilee Ministry Office  
The Episcopal Church Center  
815 Second Avenue  
New York, NY 10017  
Ph: 800.334.7626 ext. 6052 or 212.716.6052

### **Jubilee Centers in Iowa:**

1. Cedar Rapids: Christ Church Jubilee Ministry: includes Loaves and Fishes, Summer Reading Camp, Neighborhood Meals and Enrichment
2. Cedar Rapids: (Grace Church): Medical Lending Closet
3. Davenport (St. Alban's Church): Human Trafficking prevention
4. Des Moines (St. Andrew's Church): Refugee Ministry; Interfaith Youth Group; ESL program for parents of Darfur and Dinka youth
5. Fort Dodge (St. Mark's Church): Latham Clinic
6. Iowa City, (Trinity Church): Agape Café
7. Muscatine (Trinity Church): Jubilee Community Center
8. Sioux City (St. Paul's Indian Mission)
9. Sioux City (St. Thomas' Church): Food Pantry
10. Waverly (St. Andrew's): Cedar Valley Friends of the Family; Saints' Café; Community Garden
11. West Des Moines, St. Timothy's Church and Preschool

## **Ministry Development Teams**

### **Ellen Bruckner, Ministry Development Team Coordinator**

Ministry Development Teams have been active in the Diocese of Iowa for over 20 years. There are currently 7 teams who share in the leadership of their congregations. Each of the teams has its unique style and form. The development of ministry in their congregations is a common thread through all these teams, a thread they share with leadership in every congregation in the diocese. Each of our teams committed to the team concept and studied together rather than selecting a priest through the Episcopal Church search process.

There have been several different formation/training programs used in Iowa. Currently we are using a curriculum based on competencies. The team determines what skills/knowledge/ability are currently in the team and then make plans to fill in the areas that need some work.

There has been work done across The Episcopal Church on developing formation/training experiences for clergy and lay. There is no longer just one way for a person to move toward leadership. The Commission on Ministry oversees the formation and training for the teams.

The teams try to check in with each other via the internet at least quarterly. Each of the teams works to interact with its current demographic reality and remain an active presence in the community in which they minister.

## **Sexual Misconduct Prevention:**

### **Safeguarding God's Children & Safeguarding God's People**

#### **Amy Mellies, Diocesan Coordinator**

### **Safeguarding God's Children**

The diocesan-approved child abuse prevention education and training, Safeguarding God's Children, is required for all who regularly work with or around children or youth. All vestry members and clergy must be trained as well.

## **Safeguarding God's People**

Safeguarding God's People: Prevention of Sexual Harassment & Sexual Exploitation in Communities of Faith is required of any person who engages in, supervises or makes decisions involving pastoral relationships including, but not limited to, Diocesan Standing Committee, Board of Directors, Commission on Ministry and congregational vestry members; clergy; anyone providing counseling, pastoral care, spiritual direction or guidance, ministrations of any sacrament; licensed ministers such as pastoral leaders, worship leaders, preachers, Eucharistic visitors and catechists; persons in the ordination process and all paid employees.

### **Online Training**

Online training for both Safeguarding God's Children and Safeguarding God's People is available through the administrator in your congregation who will set up a username and password unique to you. Contact Amy Mellies at [amellies@iowaepiscopal.org](mailto:amellies@iowaepiscopal.org) if your congregation needs help getting your administrator set up or trained.

### **Safeguarding Policies Update**

A group of people from around the Diocese will be taking a look at the 2018 Safeguarding Model Policy that the National Church put out. We will be updating our own policy over the course of the next several months.

## **Transition Ministry**

**The Rt. Rev. Alan Scarfe; Ms. Traci Ruhland Petty, assisting**

As of September 13, 2019, these congregations are in active transition:

- Trinity, Muscatine.

A number of active transitions were settled in the last year, and the following clergy transitions have occurred:

- The Rev. Judith Dalmasso was appointed Priest in Charge at St. Alban's Davenport
- The Rev. Tom Early was elected Rector of St. Alban's, Spirit Lake
- The Rev. John Greve was elected Rector of Grace Church, Cedar Rapids
- The Rev. Kristine Leaman was appointed Priest in Charge at St. Mark's, Fort Dodge
- The Rev. Beth Preston was appointed Consulting Priest in Partnership at Trinity, Emmetsburg
- The Rev. Zebulun Treloar was appointed Assisting Priest at St. Paul's Episcopal Cathedral, Des Moines
- The Rev. Jay Denne resigned as Pastor of St. Thomas, Sioux City, to focus on his work at St. Luke, ELCA, and family responsibilities.
- The Rev. Steve Godfrey resigned as Missioner of Congregational Development and Transitions to increase his role as rector of St. Andrew's, Des Moines, to 3/4 time, and serve as a transitions consultant for the diocese.
- Bishop Michael Last is serving as consultant for congregational development.

Also this past year:

- Elliott Blackburn who had been serving St. Matthew's by the Bridge, Iowa Falls; and Chuck Lane, deacon, serving with Trinity Church, Waterloo; have each retired from these roles early in 2019 (January, March respectively)
- Cathleen Bascom, who had been working with Trinity Church, Emmetsburg, was consecrated as 10th Bishop of Kansas in March 2019.
- Jake Andrews relocated from Iowa to the Diocese of Spokane, was subsequently ordained on behalf of our diocese as priest; and is engaged in bi-vocational ministry with cathedral and university there.
- Stacey Gerhart has taken a 3-month leave from All Saints, Storm Lake, to serve in the Diocese of Swaziland, returning mid-October.

## United Thank Offering

<u>Church Name</u>	<u>2018 contributions</u>
Anamosa, St. Mark's	34.18
Ankeny, St. Anne's	75.00
Bettendorf, St. Peter's	110.00
Cedar Rapids, Christ	1,464.50
Clinton, Christ	451.62
Council Bluffs, St. Paul's	1,080.28
Des Moines, St. Paul's	832.93
Iowa City, Trinity Church	1,360.36
Maquoketa, St. Marks	1,086.24
Mount Pleasant, St. Michael's	310.00
Waterloo, Trinity	125.36
<u>Diocesan Convention</u>	<u>394.23</u>
TOTAL Sent to UTO in NYC	\$ 7,324.70

The Diocese of Iowa submitted two UTO grant applications for consideration in 2019, one on behalf of a project in Iowa and the other in conjunction with an overseas companion diocese that is part of the greater Anglican Communion, as allowed by UTO guidelines. Both grants were among the 33 grants awarded this year.

"Nzara Pre-Natal Birth Clinic" grant was funded with a \$28,520.00 award. The upgrades to the existing clinic will offer sanitary conditions for pregnant women.

The Faith and Grace Garden, at St. Timothy's in West Des Moines was awarded a \$10,604.67 UTO grant to build a greenhouse. This garden brings people from multiple faiths and cultures together to grow food for the food insecure.

We in Iowa give thanks to God for the thankful giving of many across our Church and for the recipients' work enriching the lives of many through the vision in each of the proposals.

## Diocesan Lifelong Christian Formation

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### Education For Ministry (EfM)

**The Rev. John Doherty**

This is the THIRTY THIRD year for Education for Ministry in this Diocese! The Diocese of Iowa is a supporting diocese of EfM which provides training for a coordinator and financial incentives for people registering. As of January 2019, I have become the new diocesan coordinator. The Rev. Anne Moats Williams has given many years of service to this diocese as coordinator. She is also an EfM trainer and mentor. This year there were 43 active students with five active groups: Anamosa (Anamosa State Penitentiary), Cedar Falls (St. Luke's), Cedar Rapids (Christ), Des Moines (St. Paul's), and Iowa City (Trinity). The Diocese had 7 active mentors in 2018-19 but just certified a new mentor. There are 11 inactive mentors. There have been over 300 individual graduates from EfM, most of whom are resident in the Diocese. 5 people graduated in May 2018. Since the program began in this Diocese in 1986, there have been at least 39 individuals who have been ordained/certified either to the permanent diaconate, to Canon 9 priesthood, Ministry Development Teams or have gone on to 3-year seminary training after they participated in EfM. There are countless members of the laity who have had their ministries enhanced and have gone on to serve in leadership positions in their parishes, communities, and diocese. Some individuals who have been certified/ordained under the Ministry Development Team program in our Diocese are now students in EfM.

The Anamosa State Penitentiary group is starting its sixteenth year. It has impacted sixty-seven (67) men, and graduated twenty. This year 11 men are in the group, six are mid-program, and five are year one members.

The EfM curriculum helps to develop an individual's spirituality and encourage mutual ministry. It also fosters evangelism in that it prepares individuals with the academic and theological background go out into the world and be witnesses to their faith.

In Iowa there are two individuals who are trainers for the EfM program. One is the retired judicatory head of the Disciples of Christ, The Rev. Dr. Richard Guentert and the other is The Rev. Anne Moats Williams. In that capacity, they each travel to all parts of the country to train mentors in the EfM process.

In August of 2019, we held a mentor training for 2 groups, foundation and formation, both of which had 7 enrollees coming from Iowa, Illinois, Georgia, and Nebraska. Contact me for more information or to give a presentation at your church: [jdoherty@iowaepiscopal.org](mailto:jdoherty@iowaepiscopal.org)

**Summer Ministry School & Retreat - 2019**  
**The Rev. Ruth Ratliff & The Rev. Jeanie Smith, Co-Directors**

This year's Summer Ministry School and Retreat collaborated with the diocesan Engaging All Disciples initiative to offer tracks related to the seven EAD cohorts being formed in the diocese. Each track involved participants in "Engaging" in one of these topics: Our Stories: Evangelism; New Generations of Faith; Creative Expressions of Worship; Our Resources; The Way of Love and Discipleship; Our Neighbors and Neighborhoods: Missions; and Justice through Public Policy. Ellen Bruckner, coordinator of the EAD initiative, and Meg Wagner, missionary for communications and reconciliation, recruited outstanding facilitators for each of these sessions. Among them were Alan Yarborough, Communications Coordinator for the Episcopal Church. He also opened SMSR on Friday evening with a program on Civil Discourse.


Other SMSR tracks added to the depth and variety of SMSR offerings: Christ Within: Mind-Body-Spirit Practices presented by the Rev. Catherine Quehl-Engle; "Mortal, Can These Bones Live?": Hope In Today's Weary World, presented by the Rev. Jean McCarthy; and "The Parables of Jesus: Exploring New Meanings," presented by Paul Muhle. There was also an increase this year in the number of SMSR participants enrolling for their own solo retreat.

Worship services during SMSR this year used the Australian Prayer Book, a book of Celtic Prayers, and a Eucharistic Prayer focused on creation care written by Jennifer Latham of St. Paul's Grinnell.

As with every year at SMSR, those present had lots of time for visiting with friends and colleagues, for dialoging with new acquaintances, for sharing God's love with one another. This remarkable weekend is such a treasured part of our Diocesan life for good reason. Please consider joining us in 2020 the weekend of June 26-28.

Diocesan Relations:

## 2018 CROP Hunger Walks in Iowa



**Iowa's Top Ten in 2018**

1. Quad Cities	\$45,796
2. Waco Canvas	\$33,266
3. Ames	\$31,007
4. Sioux City	\$25,223
5. Johnson Co.	\$24,390
6. Cedar Rapids	\$18,808
7. Cedar Valley	\$15,852
8. Muscatine	\$14,809
9. Dubuque	\$13,610
10. Burlington	\$10,164

**\$3,000 Plus**

Pella	\$9,736
Mitchell County	\$6,778
DeWitt	\$5,693
Grinnell	\$5,676
Union County	\$5,268
Winterset	\$5,188
Cedar Rapids West	\$4,266
Grundy Center	\$3,779
Mid Lee	\$3,698
Jasper County	\$3,671
Ely	\$3,309
Algona	\$3,301
Van Buren County	\$3,465

**Iowa's Impact on Hunger in 2018**


**\$319,793 Raised to transform communities around the globe through just and sustainable responses to hunger, poverty, displacement, and disaster.**

- **\$15 provides home gardening** to a family for extra nutrition and income.
- **\$24 provides 50 chicks** to a family, providing them a self-propagating food source.
- **\$50 provides disaster preparedness training** to a family for their safety.
- **\$115 provides a latrine** to a family for better overall health.
- **\$225 provides home gardening to 15 families**, tools and 13 types of seeds.
- **\$640 provides chickens, gardening and clean water to 10 families**, hens and a rooster, 13 types of seeds, gardening tools and clean water access.

**AND 25% of funds went toward addressing hunger in IOWA!**

**Thank You!**

**Church World Service CROP Hunger Walks**  
**Lenny Blue: Community Engagement Specialist**  
**Cell: 816-266-3555 - lblue@cwsglobal.org - National Office: 800-297-1516 - cwsglobal.org**



**Iowa Interfaith Power & Light**  
**Matt Russell, Executive Director**

Iowa Interfaith Power & Light envisions a stable climate where humans live in right and just relationship, interconnected with a healthy, thriving, natural world. Our mission is to inspire and mobilize Iowans of faith and conscience to take bold and just action on climate change.

Our focus is:

- Inspiring and engaging individuals, families, and faith and local communities to embody spiritual and societal transformation by reducing their greenhouse gas emissions while building a new relationship with Earth.
- Mobilizing people of faith and conscience to advocate for just and equitable climate solutions at the local, state, and national levels.
- Working collaboratively with the network of values driven faith and secular organizations in Iowa, diverse partner organizations, and marginalized communities.
- Modeling shared leadership and decision-making within our organization and our partnerships.
- Focusing on our common values by broadly communicating the moral obligation to address the urgency of global warming and connecting that work to related issues.

We are in the greatest moment of transformation in human history. We are called to move from the world of scarcity powered by fossil fuels into a new world of abundance dependent on the great gifts and diversity of creation. Our creator invites us to embrace a future of clean, renewable energy and of managing living systems by working in partnership with creation to solve human problems rather than trying to force nature to bend to our will.

We invite you to use our website to find resources and to join our statewide work in finding and implementing faith-based solutions to the climate crisis. [www.iowaip.org](http://www.iowaip.org). Or contact our executive director Matt Russell at [director@iowaip.org](mailto:director@iowaip.org).

**Iowa Religious Media Services (IRMS) - Finding the Simple Way**  
**Sharon E. Strohmaier, Executive Director**

It is with feelings of both accomplishment and sadness that I write my final report to the Episcopal Convention on behalf of Iowa Religious Media Services. As you should be aware, by the end of this year IRMS will be closing its doors following 33½ years of service to the Episcopal Diocese of Iowa and its covenanting denominational partners in Iowa and the Upper Midwest. On this day, I recall a quote from a book on creative problem solving: "The quality of the original idea determines the ultimate outcome." Whenever I am seeking a solution to a complicated problem, I return to this concept and never settle on my first idea. I wait for a more refined and elegant idea to appear, which it always does. This is the nature of creative problem solving. This is the way I have learned to identify the best ideas, those that are well-thought-out, elegant and simple. Long-considered and well-researched, IRMS was such an excellent idea.

It took seven years of planning and dreaming to bring the idea of IRMS to fruition. Our mission at the beginning, as it is at the end, has remained the unchanged: to provide local congregations with quality Christian education resources all vetted for the mainline theological perspective. When it became apparent that a wealth of newly produced and innovative media was being developed to support religious education, the IRMS steering committee advanced a concept that was both timely and remarkable. Timely because with the introduction of video recordings, there was a need for churches to access an organized collection of media developed in a simple, yet comprehensive way, designed expressly for local churches. The actual founding of IRMS was remarkable because the then eight denominations all agreed to covenant its support within a relatively short period of time, thus ensuring broad participation. Through IRMS, the denominations and churches had a simple way to locate the resources they needed. Over the past 33½ years, IRMS has continued to help congregations find the simplest way to undergird Christian education.

Following my hiring 18½ years ago, IRMS staff and volunteers completely re-tooled the IRMS office processes and reorganized the collection, to better serve our clients whose needs were broadening

to include more resources on social justice, racism, climate change, personal development, family life and spirituality. The result was a leaner and meaner IRMS designed to help churches express their religious life throughout the greater community. Some of this was driven by an increased understanding of good stewardship on the part of churches who wanted to share resources with one another. Some of this was an expression of my heartfelt belief that every penny IRMS received came from someone's tithe or offering. This sacred view of shared resources has been a guiding force for IRMS during my tenure.

For 18½ years, IRMS and the Diocese have walked together on this simple way. During my tenure at IRMS, we have shared eighteen Annual Conventions and eighteen Summer Ministry Schools and Retreats, where IRMS provided resources for a number of track leaders. I watched Bishop Alan Scarf re-energize the Diocese of Iowa, bringing both Revival and Renewal and an emphasis on the viability of the small church. And, in the process, I have purchased way too much English toffee from the fine folks at Sioux City St. Thomas!

Working with many churches, I have gotten to know so many of you over the last 18 years. I have heard stirring speeches and impassioned discussions. The individual whom I have come to know the best is Episcopal representative to the IRMS board and board treasurer Rev. Jeanie Smith. She is the only person from the board who has been involved with IRMS even longer than I, and she is as responsible as I am for maintaining the good stewardship that undergirds IRMS financial resources. Thank you, Jeanie, for all your heavy lifting.

There will not be an IRMS display at the 167th Convention of the Episcopal Diocese this October, but I know that the work that IRMS has done within the Diocese will continue to ripple out into the churches and communities we have served. Thank you for walking with me on this unique path and for allowing IRMS to help you find the simple way to quality resources. IRMS has indeed been a stellar demonstration of the concept that "the quality of the original idea determines the ultimate outcome." As the churches of the Episcopal Diocese continue to seek relevance, may you discern other simple ways to be the church in Iowa in the 21st century.

## Parochial Statistics Information:

### Summary of Diocesan Statistics 2016-2018

	<u>2016</u>	<u>2017</u>	<u>2018</u>
Clergy canonically resident	154	159	156
Clergy Received/Ordained	3	4	5
Clergy Transferred	5	3	1
Candidates for Holy Orders	3	3	5
Postulants for Holy Orders	6	4	4
Licensed Worship Leaders	66	70	61
Licensed Eucharistic Ministers	139	141	134
Extraordinary Eucharistic Ministers			16
Licensed Eucharistic Visitors	67	83	61
Licensed Preachers	22	14	10
Licensed Catechists	8	8	5
Licensed Pastoral Leaders	4	7	7
Congregations	60	60	
Chapels	1	1	1
Baptized Persons	7058	6824	7,018
Communicants	6044	5766	6,087
Baptisms	76	87	127
Confirmations and Receptions	93	93	83
Marriages	39	38	17
Burials	154	122	109
Church School Pupils	579	457	560

## Parochial Statistics: Vital Statistics 2018

City, Church Name	Members		Total	Attendance	
	2016	2017	Communicants	Avg. Sun.	Easter
Algona, Church of St Thomas	63	61	37	16	23
Ames, St Johns by the Campus	335	333	330	107	195
Anamosa, St Marks Church	19	17	17	13	34
Ankeny, St Annes by the Fields	76	78	78	48	68
Bettendorf, St Peters Church	87	82	59	35	72
Boone, Grace Church	15	15	15	13	28
Burlington, Christ Church	76	73	72	35	62
Carroll, Trinity Church	11	9	9	8	19
Cedar Falls, St Lukes Church	214	216	216	89	136
Cedar Rapids, Christ Church	607	602	523	138	173
Cedar Rapids, Grace Church	115	103	82	38	73
Chariton, St Andrews Church	26	39	39	17	17
Charles City, Grace Church	17	17	12	8	11
* Clermont, Church of the Saviour	22	22	22	12	16
Clinton, Christ Church	90	95	90	42	101
Coralville, New Song Church	157	157	157	50	72
Council Bluffs, St Pauls Church	82	83	60	30	52
Davenport, St Albans Church	168	172	163	33	59
Davenport, Trinity Cathedral	603	604	473	142	316
Decorah, Grace Church	41	40	38	20	27
Denison, Trinity Church	8	15	15	8	21
Des Moines, Cathedral Church of St Paul	352	349	349	147	311
Des Moines, St Andrews Church	141	280	140	92	206
Des Moines, St Lukes Church	381	376	206	69	178
Des Moines, St Marks Church	27	27	27	9	21
Dubuque, St Johns Church	170	169	77	46	127
Durant, St Pauls Church	43	40	40	17	42
Emmetsburg, Trinity Church	18	21	20	10	14
Fort Dodge, St Marks Church	54	54	54	42	100
Fort Madison, St Lukes Church	50	51	51	24	58
Glenwood, St Johns Church	9	8	8	7	4
Grinnell, St Pauls Church	110	111	108	54	105
Harlan, St Pauls Church	10	9	9	7	8
Independence, St James Church	19	19	19	15	22
Indianola, All Saints' Church	18	14	14	7	14
Iowa City, Trinity Church	582	566	562	148	344
Iowa Falls, St Matthews-by-the-Bridge	21	26	26	17	15
Keokuk, St Johns Church	94	92	87	22	30
Le Mars, St Georges Church	5	5	0	3	6
Maquoketa, St Marks Church	33	42	42	18	31
Marshalltown, St Pauls Church	72	72	59	33	36
Mason City, St Johns Church	116	108	108	46	65
Mount Pleasant, St Michaels Church	40	40	40	28	37
Muscatine, Trinity Church	100	100	90	27	32
Newton, St Stephens Church	99	96	54	33	47
Orange City, Church of the Savior	48	49	49	27	66
Oskaloosa, St James Church	52	52	37	22	31
Ottumwa, Trinity Church	40	38	31	20	38
Perry, St Martins Church	66	65	30	17	27
Shenandoah, St Johns Church	6	16	16	13	19
Sioux City, Calvary Church	36	51	40	19	43
* Sioux City, St Pauls Indian Mission	100	100	100	32	68
Sioux City, St Thomas Church	175	170	165	26	56
Spirit Lake, St Albans Church	98	103	95	49	0
Storm Lake, All Saints Church	34	34	34	17	26
Waterloo, Trinity Parish	140	145	134	51	101
Waverly, St Andrews Church	22	15	15	11	18
Webster City, Church of the Good Shepherd	36	38	38	17	33
West Des Moines, St Timothys Church	596	634	606	166	359
	6845	7018	6087	2310	4313

## Parochial Statistics: Vital Statistics 2018

City, Church Name	Marriages	Burials	Baptisms	Received	Confirmed	Church School Students
Algona, Church of St Thomas	0	1	1	0	0	10
Ames, St Johns by the Campus	0	9	0	0	4	25
Anamosa, St Marks Church	0	4	0	0	0	0
Ankeny, St Annes by the Fields	0	1	0	0	0	12
Bettendorf, St Peters Church	0	5	3	0	0	10
Boone, Grace Church	0	0	2	0	0	0
Burlington, Christ Church	0	1	0	0	1	0
Carroll, Trinity Church	0	0	0	0	2	0
Cedar Falls, St Lukes Church	1	4	1	1	0	16
Cedar Rapids, Christ Church	0	7	2	0	5	0
Cedar Rapids, Grace Church	1	1	4	0	1	2
Chariton, St Andrews Church	0	1	8	0	0	0
Charles City, Grace Church	0	0	0	0	0	0
* Clermont, Church of the Saviour	0	0	0	0	0	0
Clinton, Christ Church	0	3	3	0	0	10
Coralville, New Song Church	1	1	1	0	0	14
Council Bluffs, St Pauls Church	0	2	2	3	2	0
Davenport, St Albans Church	0	2	0	1	3	5
Davenport, Trinity Cathedral	1	4	4	1	1	8
Decorah, Grace Church	1	0	0	0	0	0
Denison, Trinity Church	0	0	2	0	1	0
Des Moines, Cathedral Church of St Paul	1	5	4	0	4	49
Des Moines, St Andrews Church	0	5	17	0	3	35
Des Moines, St Lukes Church	1	3	3	0	4	0
Des Moines, St Marks Church	0	0	0	0	3	0
Dubuque, St Johns Church	0	3	2	0	0	8
Durant, St Pauls Church	0	0	1	0	0	0
Emmetsburg, Trinity Church	0	0	3	0	0	1
Fort Dodge, St Marks Church	1	3	3	0	4	7
Fort Madison, St Lukes Church	1	0	1	0	0	11
Glenwood, St Johns Church	1	1	0	0	0	0
Grinnell, St Pauls Church	1	3	3	0	0	11
Harlan, St Pauls Church	0	0	0	0	0	0
Independence, St James Church	0	0	0	0	0	0
Indianola, All Saints' Church	0	0	0	0	0	0
Iowa City, Trinity Church	0	3	5	2	3	65
Iowa Falls, St Matthews-by-the-Bridge	0	1	0	0	0	2
Keokuk, St Johns Church	0	3	0	0	0	0
Le Mars, St Georges Church	0	0	0	0	0	0
Maquoketa, St Marks Church	0	0	4	0	0	6
Marshalltown, St Pauls Church	0	4	2	0	2	0
Mason City, St Johns Church	1	3	0	0	0	9
Mount Pleasant, St Michaels Church	0	0	6	0	2	0
Muscatine, Trinity Church	0	1	1	0	7	19
Newton, St Stephens Church	0	1	2	0	0	3
Orange City, Church of the Savior	0	0	0	0	2	6
Oskaloosa, St James Church	0	1	1	0	0	0
Ottumwa, Trinity Church	1	0	0	0	0	0
Perry, St Martins Church	0	1	1	0	0	8
Shenandoah, St Johns Church	0	0	0	0	0	0
Sioux City, Calvary Church	0	1	16	0	5	21
* Sioux City, St Pauls Indian Mission	0	4	11	0	0	0
Sioux City, St Thomas Church	0	4	1	0	0	0
Spirit Lake, St Albans Church	0	1	0	3	0	6
Storm Lake, All Saints Church	1	1	0	0	0	7
Waterloo, Trinity Parish	1	3	3	0	1	64
Waverly, St Andrews Church	0	0	0	0	0	0
Webster City, Church of the Good Shepherd	0	1	0	1	1	12
West Des Moines, St Timothys Church	2	7	4	1	9	98
	17	109	127	13	70	560



## Parochial Statistics: Financial Statistics 2018

City, Church Name	Pledge Cards	Amount Pledged	Average Pledge/Wk	Plate & Pledge	Operating Income	Diocesan Assistance	Total Revenues
Algona, Church of St Thomas	10	\$38,038	\$73	\$38,541	\$38,563		\$38,563
Ames, St Johns by the Campus	61	219,180	69	279,180	345,880		352,620
Anamosa, St Marks Church	2	2,900	28	1,520	11,884		11,884
Ankeny, St Annes by the Fields	27	84,666	60	82,261	87,303		87,303
Bettendorf, St Peters Church	31	140,640	87	145,716	146,975		169,583
Boone, Grace Church	8	16,840	40	21,117	21,117		21,117
Burlington, Christ Church	23	57,010	48	64,696	209,658		212,642
Carroll, Trinity Church				2,750	35,539		35,539
Cedar Falls, St Lukes Church	81	241,516	57	247,276	261,816		272,725
Cedar Rapids, Christ Church	76	282,210	71	333,136	355,070		367,203
Cedar Rapids, Grace Church	27	57,170	41	85,509	85,509		85,509
Chariton, St Andrews Church	6	12,090	39	15,290	39,054		39,442
Charles City, Grace Church	8	7,992	19	12,810	14,860		14,900
* Clermont, Church of the Saviour	11	21,110	37	23,383	28,317		29,473
Clinton, Christ Church	30	41,295	26	44,103	141,113		142,355
Coralville, New Song Church	35	113,744	62	110,725	115,130		213,294
Council Bluffs, St Pauls Church	19	53,000	54	55,379	55,379		71,459
Davenport, St Albans Church	22	62,600	55	70,721	74,312		77,340
Davenport, Trinity Cathedral	113	315,679	54	377,522	653,956	15,000	700,261
Decorah, Grace Church	11	25,140	44	39,480	39,513		43,013
Denison, Trinity Church				2,403	17,931	3,047	20,801
Des Moines, Cathedral Church of St Paul	110	306,287	54	334,665	499,819		542,381
Des Moines, St Andrews Church	45	175,000	75	167,642	207,222		411,202
Des Moines, St Lukes Church	60	167,962	54	213,198	213,841		225,605
Des Moines, St Marks Church	7	7,500	21	8,871	50,871	12,000	52,615
Dubuque, St Johns Church	25	65,316	50	74,582	128,368		200,568
Durant, St Pauls Church		29,166		30,246	35,453		44,025
Emmetsburg, Trinity Church	6	15,540	50	28,044	28,044		28,059
Fort Dodge, St Marks Church	16	23,115	28	35,043	244,695		251,989
Fort Madison, St Lukes Church	12	24,375	39	25,202	25,202		25,202
Glenwood, St Johns Church	5	9,500	37	8,294	10,392		12,392
Grinnell, St Pauls Church	29	97,000	64	98,705	109,789		132,094
Harlan, St Pauls Church				12,746	15,089		27,089
Independence, St James Church	9	17,860	38	18,909	20,887		43,896
Indianola, All Saints' Church				25,645	31,645	6,000	32,548
Iowa City, Trinity Church	107	330,257	59	424,416	525,744		567,833
Iowa Falls, St Matthews-by-the-Bridge				19,496	24,095	1,559	31,772
Keokuk, St Johns Church	9	20,860	45	33,096	109,380		109,380
Le Mars, St Georges Church				3,362	3,362		12,862
Maquoketa, St Marks Church		16,436		17,038	23,607		23,607
Marshalltown, St Pauls Church				42,585	95,755		157,210
Mason City, St Johns Church	33	113,338	66	143,792	176,043		177,288
Mount Pleasant, St Michaels Church				31,958	58,169		58,169
Muscatine, Trinity Church		33,866		23,496	140,283		146,773
Newton, St Stephens Church	21	79,126	72	101,080	141,726		141,726
Orange City, Church of the Savior				25,455	26,917	529	26,917
Oskaloosa, St James Church	13	24,152	36	33,130	78,782		79,982
Ottumwa, Trinity Church	22	45,620	40	47,388	59,009		68,645
Perry, St Martins Church	10	14,400	28	20,570	79,661		96,328
Shenandoah, St Johns Church	6	21,260	68	23,561	56,568		57,133
Sioux City, Calvary Church	14	11,816	16	10,295	26,002		29,545
* Sioux City, St Pauls Indian Mission	16	3,500	4	5,607	21,259	12,900	23,259
Sioux City, St Thomas Church	27	79,570	57	98,599	109,837		140,786
Spirit Lake, St Albans Church	32	67,552	41	105,019	118,157		126,904
Storm Lake, All Saints Church	10	40,000	77	42,167	62,942		63,942
Waterloo, Trinity Parish	35	74,440	41	85,487	96,065		105,219
Waverly, St Andrews Church		6,995		7,163	9,137		9,137
Webster City, Church of the Good Shepherd	5	26,000	100	37,977	44,920	1,199	48,540
West Des Moines, St Timothys Church	120	388,397	62	423,018	425,088		570,894
	1,405	\$4,129,026	\$50	\$4,941,065	\$6,912,704	\$52,234	\$7,910,542

## Parochial Statistics: Financial Statistics 2018

City, Church Name	Operating Expenses	Total Expenses	To Diocese	Total Outreach	Total Cash & Investments
Algona, Church of St Thomas	\$35,158	\$36,087	\$3,600	\$370	\$143,128
Ames, St Johns by the Campus	373,545	384,715	53,918	9,590	1,449,177
Anamosa, St Marks Church	8,230	11,367	1,500	3,137	111,485
Ankeny, St Annes by the Fields	94,361	94,361	6,506	25	7,260
Bettendorf, St Peters Church	156,007	163,616	17,384	6,726	140,256
Boone, Grace Church	21,225	21,625	681	600	20,132
Burlington, Christ Church	199,929	203,071	20,408	3,142	701,640
Carroll, Trinity Church	25,947	40,007	1,048	8,352	491,978
Cedar Falls, St Lukes Church	246,624	262,097	35,993	13,855	230,628
Cedar Rapids, Christ Church	355,902	368,535	51,772	20,033	917,039
Cedar Rapids, Grace Church	88,410	91,420	7,434	3,885	101,145
Chariton, St Andrews Church	33,384	33,772	3,392	1,388	459,151
Charles City, Grace Church	5,377	5,417	2,171	40	167,193
* Clermont, Church of the Saviour	16,982	26,849	1,680	5,078	122,536
Clinton, Christ Church	144,290	144,290	788	0	1,651,603
Coralville, New Song Church	101,500	195,914	21,067	93,629	224,320
Council Bluffs, St Pauls Church	71,606	199,106	4,060	1,200	365,291
Davenport, St Albans Church	76,854	82,980	6,743	138	42,224
Davenport, Trinity Cathedral	690,640	965,936	88,906	26,593	6,301,442
Decorah, Grace Church	38,446	59,815	6,765	7,000	95,934
Denison, Trinity Church	17,259	22,784	586	5,109	143,537
Des Moines, Cathedral Church of St Paul	546,016	590,126	63,895	16,910	2,556,039
Des Moines, St Andrews Church	228,303	424,329	32,586	46,898	437,600
Des Moines, St Lukes Church	211,896	222,953	14,448	14,037	170,943
Des Moines, St Marks Church	23,119	29,300	3,500	0	278,627
Dubuque, St Johns Church	124,250	143,806	9,646	0	873,308
Durant, St Pauls Church	45,081	45,592	5,795	3,402	5,940
Emmetsburg, Trinity Church	19,343	20,364	2,490	159	21,131
Fort Dodge, St Marks Church	296,857	310,831	27,919	20,798	414,862
Fort Madison, St Lukes Church	24,745	28,185	4,800	2,100	37,051
Glenwood, St Johns Church	12,969	15,010	708	229	240,865
Grinnell, St Pauls Church	117,145	145,045	4,862	10,150	54,874
Harlan, St Pauls Church	12,086	14,861	300	0	82,658
Independence, St James Church	19,867	47,250	2,500	6,714	65,453
Indianola, All Saints' Church	37,126	37,261	1,970	279	52,515
Iowa City, Trinity Church	533,934	613,094	76,200	48,537	924,871
Iowa Falls, St Matthews-by-the-Bridge	24,503	28,858	3,795	4,355	26,357
Keokuk, St Johns Church	103,468	103,468	6,745	1,542	431,501
Le Mars, St Georges Church	9,226	13,305	200	300	4,552
Maquoketa, St Marks Church	22,637	24,134	1,304	1,497	8,502
Marshalltown, St Pauls Church	108,281	152,996	12,777	29,398	257,954
Mason City, St Johns Church	170,949	174,264	17,250	3,220	95,889
Mount Pleasant, St Michaels Church	48,152	48,152	4,378	1,836	69,176
Muscatine, Trinity Church	233,586	349,171	16,429	14,374	3,648,161
Newton, St Stephens Church	136,384	136,384	8,056	15,493	473,829
Orange City, Church of the Savior	23,482	23,765	600	0	7,651
Oskaloosa, St James Church	61,563	100,288	9,909	1,547	881,261
Ottumwa, Trinity Church	51,005	145,008	4,990	509	181,968
Perry, St Martins Church	95,317	95,317	5,500	16,667	68,713
Shenandoah, St Johns Church	52,101	53,893	550	3,099	173,421
Sioux City, Calvary Church	30,028	30,456	1,929	698	50,391
* Sioux City, St Pauls Indian Mission	20,128	22,952	3,142	6,357	3,235
Sioux City, St Thomas Church	127,682	170,513	9,727	19,461	603,426
Spirit Lake, St Albans Church	169,247	169,247	9,827	0	384,075
Storm Lake, All Saints Church	63,942	64,942	2,397	2,000	149,071
Waterloo, Trinity Parish	136,215	140,706	13,164	4,491	89,849
Waverly, St Andrews Church	16,962	16,962	3,043	676	67,285
Webster City, Church of the Good Shepherd	45,367	66,877	7,660	2,121	16,573
West Des Moines, St Timothys Church	441,975	511,115	50,769	68,540	454,739
	\$7,246,613	\$8,744,544	\$782,162	\$578,284	\$28,251,415

## VOTING PROCEDURES FOR 167th ANNUAL CONVENTION OF THE DIOCESE OF IOWA

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Voting on Saturday, October 26, 2019 will be done electronically between the hours of 10:30 and 2pm using password protection to ensure only one vote per Certified Delegate is counted. In order to vote, Delegates must in attendance at Convention during those hours. Paper ballots will not be used, so voting may only take place online from a personal device or using the voting kiosks available at Convention. Votes are counted using the Hare Transferable Ballot system.

### **EXPLANATION OF HARE TRANSFERABLE BALLOT**

The Hare Transferable Vote System is a means of achieving elections without the necessity for multiple ballots. It achieves an election in two ways:

1. By reducing the percentage of votes required to declare an election and
2. By successive transfers of counted votes in a prescribed manner until an election is achieved.

Step one in the counting process is to count the first choice candidates on all ballots. Any candidate who is first choice for the quota number will be elected.

The quota number is the number of valid votes cast divided by the number of positions to be filled plus one and then adding one to the quotient, disregarding any fractions. Any person receiving the quota number of votes is declared elected.

*Example: 250 valid votes and 3 people to be elected. Divide 250 by 4 equaling 62.5, then add one to 62 to equal 63, the quota required for election. In a majority election, it would take 126 votes to elect each person to be elected.*

For any unfilled positions, the next step is to take from the bottom of the pile of each elected candidate the excess number of ballots over the quota and to transfer those ballots to the next expressed choice on those ballots.

Each transfer ballot is marked with the count number " (1st, 2nd, etc) count, transfers".

If there are no further choices expressed on the ballot, the ballot becomes nontransferable and is eliminated from further counting.

If positions remain unfilled after the excess transfers, the lowest ranking candidate in number of votes is eliminated and the ballots being counted for that candidate will be transferred to the next expressed choice. This transfer and elimination process is continued until an election is achieved.

When the election is by orders, the same process is followed except the ballots of each order are counted separately, but when the lowest ranking candidate is eliminated that candidate is eliminated from both orders.

The Hare system is not a majority vote system except when there are only 2 candidates for one position. In all other elections, less than a majority of votes is required for an election and the larger the number of positions to be filled the smaller the percentage of votes required to achieve an election.

Since it takes less than a majority to fill multiple positions, it is more likely that a diverse group will be elected to fill these positions.

THE RULES OF ORDER  
167<sup>th</sup> Annual Convention  
of the Diocese of Iowa

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1. When the President takes the chair, no member shall continue standing, or shall afterwards stand up, except to address the Chair.
2. When the President shall have taken the chair, the Roll of Members shall be called, and the minutes of the preceding day read; but the same may be dispensed with, by majority vote of the Convention to be decided without debate.
- 3 a. All resolutions shall be reduced to writing at the request of the President, presented to the Secretary; and no motion shall be considered to be before the Convention unless seconded.  
b. A Committee on Dispatch of Business shall be appointed to which any report or resolution may be referred for consideration and action.
4. If the question under debate contains several distinct propositions, the same shall be divided, at the request of any member, and a vote taken separately except that a motion to strike out and insert shall be indivisible.
5. When a question is under consideration, no motion shall be received unless to lay it upon the table, to take a vote thereon at a time certain, to postpone to a time certain, to postpone it indefinitely, or commit it or amend it; and motion for any of these purposes shall have precedence in the order herein named. Any motion to lay a resolution upon the table shall require a two-thirds majority vote. If a motion to lay on the table an amendment be carried, the matter before the Convention shall be proceeded with as if no amendment had been offered. The motion to lay upon the table, to take vote at a time certain and to adjourn shall be decided without debate. The motion to adjourn shall always be in order.
6. There shall be no debate upon a motion to refer to any Standing Committee a resolution then first offered to the Convention and properly referable to such Committee; but the member offering such resolution may speak five (5) minutes in explanation of its purpose. Any motion to refer a resolution to a committee not directly answerable to the Convention, shall require a two-thirds majority vote. Also there shall be no debate on a motion to recommit to a Committee, but without instructions, any report of such Committee than before the Convention. Every resolution offered for the immediate action of the Convention shall be considered at once, unless reference be requested. If reference be requested by any member, such resolution shall be referred to the appropriate Standing Committee or if in the opinion of the President, there be no such Standing Committee, then a Special Committee of such members as the President shall designate.
7. When a motion or proposition is under consideration, a motion to amend and a motion to amend the amendment, shall be in order, and it shall also be in order to offer a further amendment by way of substitute to which the amendment may be offered, but which shall not be voted on until the original matter is perfected; but either may be withdrawn by the mover with the consent of the second before amendment or decision is had thereon. No proposition not germane to the subject under consideration shall be received under color of an amendment or substitute.
8. In all questions decided numerically, the motion to reconsider must be made by a member and seconded by another, who voted in the majority; or, in case of equal division by those who voted in the negative; and, in case of vote by Orders, where there is a concurrence of both Orders, a motion to reconsider shall be made by the concurrence of three (3) members of either Order, or both Orders, voting in the majority; and in case of non-concurrence of Orders, the motion to reconsider shall come from two (2) members of that Order which gave the majority in the negative, and in either case, a motion to reconsider shall be seconded by two (2) members of either or both Orders without regard to their previous vote. And all motions to reconsider shall be made and seconded on the day the vote is taken.
9. Nominations for the Standing Committee of the Diocese, for Deputies to the General Convention, for Deputies to the Synod of the Sixth Province, for Treasurer of the Diocese, for Directors of the Episcopal Corporation, for members of the Diocesan Council, for members of such other Boards and Commissions as the Bishop may specify, shall be made on the first day of the session of the

Convention and before the recess. Such nominations may be made from the floor of the Convention, or handed in writing to the Secretary. In case of there being no more nominations to fill offices than necessary to fill such office, a ballot cast, after proper motion, by the Secretary of the Convention shall be considered a ballot required by the Canon.

10. The Secretary of the Convention shall instruct the Convention in preparation of ballots for the various elections, which ballots shall contain the names of all persons nominated in each election and each elector shall vote for the nominees they choose in accordance with the procedures under the Hare Transferable Vote System. There shall be an elections committee appointed by the President, consisting of not less than two (2) and not more than five (5) Clerics and the same number of Lay members, members of the Convention, who shall appoint the necessary clerical and lay members of said committee to receive the ballots of the Clerical Order, the remaining Clergy and Lay members to receive the ballots of the Lay Order. The Secretary of the Convention shall deliver to this Committee two (2) lists, one containing the names of those entitled to vote in the Clerical Order, the other containing the names of those entitled to vote in the Lay Order. No ballots shall be received in either Order unless the names of those nominated appear upon the proper list. All elections in the Convention shall be by ballot as above provided unless the Rule be suspended in accordance with Rule 19. When the elections committee is ready to report, its report shall be presented to the Chair. When there is a vote by Orders the votes of the Clerical Order shall be presented first then the votes of the Lay Order.
11. The reports of all Committees shall be in writing, and shall be received in course, and without motion for acceptance, unless recommitted by a vote of the Convention. All reports recommending or requiring an action or expression of opinion by the Convention shall be accomplished by resolution of the action of the Convention thereon.
12. All questions of order shall be decided by the Chair, without debate; but any member may appeal from such decision, and on such appeal no member shall speak more than once, without express leave of the Convention.
13. The names of the movers to resolutions shall appear upon the minutes of the Convention.
14. Every member who shall be in the Convention when any question is put, shall, on a division, be counted, unless an apparent conflict of interest be present in the question under consideration.
15. While the Chair is putting any question, the members shall continue in their seats, and shall not hold any private discourse.
16. When any member is about to speak or deliver any matter to the Convention, each member shall, with due respect, be addressed to the Chair, and confined strictly to the point in debate.
17. All Committees shall be appointed by the President, unless otherwise ordered.
18. Resolutions must be presented to the Secretary of the Convention at least forty (40) days prior to the Convention. The Secretary shall cause same to be duplicated and distributed to each parish and mission of this Diocese prior to the Convention. The Committee on Resolutions shall then separate submitted resolutions into Consent and Debate Calendars. Resolutions on the Consent Calendar shall receive no debate and simply be voted on as presented. Resolutions may be moved from the Consent Calendar to the Debate Calendar by vote of twenty-five (25) members of the Convention. The exceptions to this process are that the Convention may at any time consider given resolutions submitted from the floor, providing that each resolution thus submitted receives the necessary majority vote to suspend the rule, as provided in Rule 19; the Committee on Credentials and the Committee on the Dispatch of Business may submit from the floor such resolutions as required to conduct the business of the Convention; and the Resolutions Committee may present to the Convention such courtesy Resolutions as it deems appropriate.
19. No motion is in order which imposes financial responsibilities on this diocese, whether by motion to amend the proposed annual budget or change the proposed program of the Diocese, unless that motion includes provision and plans for funding same. The President shall rule on any such motion with advice from the Chancellor, the Treasurer, the Diocesan Finance Committee, the Committee on Ways and Means, or any other committee or persons s/he thinks prudent. The President may recess the Convention for a time for such consultation if s/he thinks it appropriate. The ruling of the President may be appealed and overturned by a 2/3 vote of both Orders.

20. All materials to be submitted to the Secretary for duplication and distribution to both the clerical and lay delegates of the Convention must be received in the Diocesan Office no later than forty (40) days prior to Convention. This would include, but not be limited to, agendas, budget reports, committee/commission reports, nominations, resolutions, instructions regarding parking, etc.
21. No rule shall be suspended unless with the assent of a majority of the members present.
22. The Rules of Order of the Convention shall be in force in the ensuing Convention until the organization thereof, and until they are amended or repealed by said Convention.