



The Episcopal Diocese of Kentucky

Diocesan Mission Funding Handbook
2014 Diocesan Budget Edition

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1. VISION, MISSION & MINISTRY IN THE DIOCESE OF KENTUCKY

A. GOD’S VISION—OUR VISION:

We take as our starting point the proclamation of God’s vision, which Jesus made in the synagogue in Capernaum:

“The Spirit of the Lord is upon me, because he has anointed me to bring good news to the poor. He has sent me to proclaim release to the captives and recovery of sight to the blind, to let the oppressed go free, to proclaim the year of the Lord’s favor.” (*Luke 4:18-19*)

God wants freedom proclaimed to the oppressed, healing to the brokenhearted, the good news of the Gospel lived out in our lives. In Jesus—his life, work and ministry—God’s vision was and is incarnated.

As disciples of Jesus, therefore, His vision becomes *our* vision: to bring the healing and wholeness of God’s kingdom to all with whom we come in contact. *We* are to live with “the Spirit of the Lord” upon us. *We* are the ones sent to proclaim God’s good news.

Throughout history God has led, guided, and loved His people. We believe God is leading and guiding us today, and will give us “discerning and inquiring hearts” as we seek to carry out His vision for the Kingdom in our area of Kentucky. As we have experienced God’s love for us, we are called to express God’s love to others in ways they can experience it for themselves. God continues to hope and work for the fulfillment of His vision, and therefore *we* must continue to hope and work for it.

Note: In 2006, Trustees and Council adopted the following Vision and Mission Statement for the Diocese of Kentucky: **“The Diocese of Kentucky is called to engage the world as a witness to Christ through worship, study, fellowship, evangelism, social justice, and service.”** A shorter version is: **“Embracing Christ, Engaging the World.”**

B. WHAT WE MEAN BY “MISSION”:

“Mission” means “sending”—our being sent out into our communities as the people of God. When this fundamental theological word is used in relation to “mission funding,” the misunderstanding often arises that we are referring only to congregations of “mission”—versus “parish”—canonical status.

In this handbook, “mission” refers to whatever we seek to do to respond to God’s Vision for us.

“Mission Funding” refers to the Diocese’s process of giving financial assistance to any congregation—of whatever size or status—or diocesan organization in this Diocese which has a clear plan for a mission project or initiative.

C. MISSION FUNDING REQUIRES KNOWING & RESPONDING TO THE MISSION CONTEXT

“The world is waiting to see that Christianity possesses what it professes and that what it possesses it gives of freely.” --*Samir Kafity, retired Bishop of Jerusalem*

Given our mission context in Kentucky, we know that there are God-hungry people in our communities, and we know we have something of deep value to offer them. Among the denominations in our region, the Episcopal Church has a unique understanding of the grace and forgiveness of God. We need to spread the message about, and invite others to share in God's grace and forgiveness.

Our mission context is therefore the reality of the lives of people and communities in our area of Kentucky. What we do in mission and ministry must respond to the real human needs and concerns of the people in our communities. Knowing our mission context gives us a solid understanding of the opportunities and challenges for mission in our local areas.

The Diocese of Kentucky is committed to funding mission initiatives which clearly and directly respond to the mission context out of which the initiative arises.

D. THE DIOCESE'S MISSION GOALS

1. Encourage and Support the Development of Vital Congregations

- ✝ help our congregations identify and understand the needs and ministry opportunities within their communities
- ✝ help our congregations develop the mission and ministry programs to meet those needs
- ✝ assist in identifying resources for new and on-going ministry programs
- ✝ create a collaborative partnership with congregations that goes beyond mere financial support and clergy deployment
- ✝ help congregations apply principles of evangelism and strategies for congregational development to their own particular situations
- ✝ provide training opportunities for members of congregations
- ✝ offer "formation for ministry" programs on a regional basis "to equip the saints for the work of ministry"
- ✝ work on-site with congregations

2. Use our Diocesan Financial Resources in Mission Opportunities Where They Will Be Most Effective

- ✝ strategically target how to make strong congregations in prime mission fields even stronger
- ✝ find creative ways of supporting mission in congregations which appear to have limited opportunities for congregational growth
- ✝ provide a means by which congregations are accountable for financial assistance

3. Discern and Plan to Meet Mission needs and Opportunities in Our Region

- explore opportunities for diocesan-level mission and ministry projects
- ✝ mission stations
- ✝ new mission starts
- ✝ ministry development
- ✝ regional ministry
- ✝ redevelopment of existing congregations
- ✝ deal with the mission needs of our region
 - expand our Diocesan strategy/planning beyond the places where we currently have congregations
 - expand our Diocesan mission beyond current congregational constraints
- ✝ propose some priorities for strategic mission
 - in areas where no Episcopal congregation currently exists

- in “mission stations” at existing congregations
- specialized mission/ministry in areas of diversity

2. CRITERIA FOR MISSION FUNDING

The following criteria are some of the questions which will be considered as the Diocesan Mission Funding Committee evaluates an application for project funding. For “Congregation,” read any organizational unit of the Diocese: parish, mission, department, committee, commission, regional area ministry, new mission start, diocesan mission station, school or church-related institution, etc. For “Project,” read any proposal for a new or continuing mission initiative or ministry for which funding is requested.

Vision & Mission

Does the project connect with and relate to the Diocesan Vision and the Diocese’s Mission goals? Does it relate to the congregation’s own Vision Statement and Mission Plan—i.e., has the congregation done, or is it beginning to do, the work of clearly laying out its own vision and mission goals?

Context

Does the project respond creatively to local opportunities and possibilities? Does it directly address and respond to clear mission needs in the congregation’s local community? Does the project involve and engage people and resources of the community? How will the project affect the congregation’s internal mission context, i.e., its membership, stewardship, and program life?

Design

Does the profile describe the project’s goals and objectives clearly? Are the goals and objectives measurable? Is the timetable for completing the project, and evaluating it, realistic? Are the structures in place for accountability and reporting on the project’s outcome?

Funding

What level of help does the congregation need in order to fund the project? What has the congregation committed toward the project from its own financial resources? Are there other funding “partners” who might contribute to the project? Will the project develop a life of its own beyond the initial grant or loan period?

Innovation

Does the project represent a departure from standard procedure for the congregation? Will the project be of help as a learning experience for other congregations in the Diocese? How will those learnings be shared?

Resources

Does the congregation need additional, non-financial resources or assistance to complete the project? How can the Diocese help in other ways to implement the project?

The Big Picture

What other projects is the Committee evaluating for funding? What is the relative need of the congregation for funding assistance? What future opportunities and projects may need funding in the future? What funds are available for each type of mission funding?

3. GENERAL TYPES OF MISSION FUNDING

A. MISSION DEVELOPMENT GRANTS FOR EVANGELISM OUTREACH PROJECTS

For specific, mission-oriented projects, programs and ministries to increase the congregation's evangelical outreach to the local community. This is the area where every congregation in the Diocese is eligible and encouraged to dream. We are committed to providing the resources to help every congregation engage in, and be equipped for, evangelical outreach.

Some suggestions: You may

- have an opportunity for evangelism in a new population
- need assistance in funding the congregation's use of Percept tools and other resources to learn who its community is
- need particular preparation for door-to-door or other evangelism methods—like printed materials or training
- want to improve visibility in the community via communication methods: mailings, flyers, signs
- want to start an ALPHA program to develop the faith of members & reach out to non-members
- need Vacation Bible School materials for a VBS for parish and community children
- need to try a new kind of outreach: telemarketing, a support group, a teen coffee house ministry
- need to cover training costs to equip members for a specific ministry
- need to buy new music books for a contemporary worship service

B. MISSION DEVELOPMENT GRANTS FOR STAFFING

Grants for staffing are made to assist a congregation to respond to mission needs in its community and move it to the next level of growth. Any staffing request must be tied directly to the development of a new mission start, the creation of a mission station, or any other mission initiative for which staffing is essential. By the second year of funding those in charge of the mission project must meet with representatives of Mission and Evangelism and/or Mission Funding to make plans to become self-sustaining.

Staffing requests must be the result and outcome of a project and not the purpose itself.

4. THE MISSION FUNDING COMMITTEE

A. Who's On the Committee

The Diocesan Mission Funding Committee is a subcommittee of Trustees & Council. Its membership has been appointed by Trustees & Council and includes clergy & lay leaders from across the Diocese, members of Trustees & Council, members of the Department of Evangelism & Congregational Development, and members of the Diocesan Staff. The Bishop is an *ex-officio* member of the Committee and works closely with it.

[Note: In the Fall of 2006, a new Department of Mission and Evangelism was formed by Trustees and Council. The Mission Funding Committee is related to that Department and to T&C in ways yet to be mapped out clearly. For the last several years and continuing into 2014, the Mission Funding Committee includes the following positions: Committee Chair, Vice-Chancellor of the Diocese, Vice-President of T&C, Treasurer of the Diocese, Chair and Co-Chair of Diocesan Budget Committee, Representative of the Department of Mission and Evangelism, Diocesan Canon to the Ordinary, Diocesan Controller, Bishop White (*ex-officio*), and four at-large members.

The Chair of the Mission Funding Committee also serves on the Diocesan Budget Committee, Diocesan Finance Committee, and the Department of Mission and Evangelism.]

B. When the Committee Meets

The Committee meets each year in July to consider proposals. Other meetings are scheduled throughout the year as needed. Marmion loan applications may be submitted throughout the year and are generally handled electronically.

The deadline for grant requests for funding through the Diocesan Budget (and for renewal of such requests) is June 1. Marmion Loan Applications may be received and acted upon at any time during the year.

5. HOW TO APPLY FOR FUNDING

Please note: If you are not sure what type of funding you should ask for, or under what category your request might fall, please contact one of the Co-Chairs of the Mission Funding Committee at betty.blodgett@murraystate.edu or cloescher@gmail.com for assistance before you begin working on the application.

- A. Please complete the **Mission Funding Application Form**. This is required for all requests for funding.
 - 1) Provide the basic information asked for.
 - 2) Thoroughly describe your project, event or request.
 - 3) Name the specific type of grant or loan you are requesting.Please be thorough. We are a Diocese gifted for mission, called to be responsible stewards of our resources. Your diligence in completing the application will help the Committee support your plans.
- B. For requests of \$3,000 or more, please complete the **Information Update Form** and attach any requested documents.
- C. Use the Chair or a member of the Committee as a sounding board as you draft the application.
- D. Make sure the appropriate leadership within the congregation is in agreement with the application.
- E. Sign the **Covenant of Mission Form**. This is required for all requests for funding. A fully signed copy will be returned to you after the Committee (and Diocesan Convention when the funding is part of the Diocesan Budget) approves the application. If adjustments to the application are needed in order for it to be approved, a new Covenant of Mission Form will be sent to you for re-signing after the Committee meets.
- F. When the application is completed, please send your application via e-mail to Becky Meyer (beckym@episcopalky.org). If you are unable to send an e-mail to Becky, then send a paper copy to her in the Diocesan Office or fax her at (502) 587-8123:
Diocese of Kentucky
425 S. 2nd Street, Suite 200
Louisville, KY 40202

Your application will then be forwarded to the Mission Funding Committee who will work with you to make sure all the necessary information is turned in before the Committee meets.

Note:

1. The final, completed application must be received at least fourteen (14) days before the Committee meeting so copies can be sent to Committee members before the meeting.
2. Except for clear emergencies, we are going to be consistent in acting only on those applications which are fully complete by the time of the Committee meeting. The Committee will do everything in its power to help you successfully complete the application.
3. Your timely completion of requested evaluation reports on the project will affect the Committee's consideration of any future funding requests you may submit.
4. The Diocesan Controller (Becky Meyer) will need to have a fully signed copy of the Covenant of Mission Form in order to issue any funds.

6. THE PROJECT APPLICATION FORM

Please be sure to complete both sections (Profile and Criteria) of this application.

THE PROFILE

A. The Details

1. What is the project?
2. Who is the sponsoring congregation or organization?
3. Who will oversee the project?
4. Who is the contact person for the project?
 - a. Name
 - b. Position/Title
 - c. Address
 - d. Phone
 - e. Fax
 - f. E-mail
5. Give dates, location, events, activities and other pertinent details.
6. Describe your target audience—who will you be reaching and why?
7. Describe evidence of your congregation's or organization's agreement to the project—i.e., vestry or bishop's committee or board vote or recommendation, planning committee involvement, congregational study, etc.
8. Give a timeline for the implementation and completion of the project.

B. The Request for Funding

1. What type of funding are you requesting?
2. What is the amount of funding you are requesting?
3. What is your congregation's or organization's financial commitment to the project?
4. What other financial partners are there?
5. Provide a statement of cost and a timeline for expenditures.
6. For amounts over \$3,000, please complete the **Additional Information Form**.

THE CRITERIA

(How does this mission initiative or project address the Diocese's Criteria for Mission Funding?)

Parishes and Missions that receive Mission Funding grants must pledge and pay their their full apportionment to the Diocese. If payments are not received Mission Funding checks will be held until payments are up to date.

Resources awarded through Mission Funding Grants are meant to support parishes and missions that are currently self-sustaining or are working toward such sustainability. The Diocese, working through Mission Funding, Mission and Evangelism, and Trustees and Council want to help those entities--both parishes and missions--achieve the goal of becoming realistically self-supporting. Any parish or mission that is using a Mission Funding Grant to balance their budget will meet with a designated mentoring group to help them envision and implement a plan toward such a goal that will be reviewed yearly along with any grant request.

We know that this cannot be a one size fits all plan and that each congregation is unique and will require its own plan and time table. However, we do feel that it is important that such a goal be discussed, embraced, and implemented by the parish or mission.

A. Vision & Mission

1. Describe the congregation's or organization's Vision Statement and Mission Plan.
2. Describe how the project connects with and relates to the Diocesan Vision and Mission Goals.

B. Context

1. Describe your congregation's or organization's mission context.
2. Describe how the project responds/relates to the clear mission needs and opportunities in your congregation's or organization's local community.
3. What overall effects do you foresee in the life of your congregation or organization because of this project?
4. What overall effects do you foresee in the life of your local community because of this project?

C. Design

1. What goals do you intend to achieve?
2. How do the project's activities or events as described above relate to your goals?
3. What measurements will you use to evaluate success and completion of the project?
4. How will you gather the data necessary for reporting on the project?
5. What do you hope to learn from this project?

D. Funding

1. Name the type of funding (the specific type of grant or loan) you are requesting.
2. Describe why you need this funding assistance.
3. If the project will be on-going after the period covered by the initial grant/loan, how will the project be funded?

E. Innovation

1. Describe how the project represents something new and innovative for your congregation—a departure from “standard operating procedure.”
2. Will the project be of help as a learning experience for others in the Diocese? How will you share those learnings with the Diocese?

F. Resources

1. What other (non-financial) resources might you need from the Diocese to help you with this project?

7. ADDITIONAL INFORMATION FORM

For any request over \$3,000, please provide the following information.

[Note: This is designed for congregations. Organizations need to consult with the Mission Funding Committee Chair to decide what additional information is needed.]

A. Analysis of Congregational Growth/Development

Please provide statistics for the past three years on the following areas of your congregation's life:

1. Membership

- a. number of baptized members (adults & children)
- b. net growth or decrease in baptized membership
- c. average Sunday worship attendance

2. Stewardship

- a. total number of potential household/pledging units in the congregation
- b. number of pledges received
- c. total amount pledged
- d. total amount received
- e. average amount per pledge
- f. how many new pledges
- g. average amount of new pledge

Describe your current stewardship process.

What is the current average household income of the congregation?

3. Program

- a. description of current and planned programs in education, outreach, etc.
- b. attendance at programs and events

B. Analysis of Congregation's Financial Status

1. Provide a copy of the congregation's budget (income and expenses) for 2012 and financial statement which includes a balance sheet and statement of revenue and expenses for 2012.
2. Report on current and projected financial assets available to your congregation
 - a. pledge income
 - b. plate and other income
 - c. current assets: savings, investments, etc.
 - d. future/pending bequests
 - e. current indebtedness/loans (diocesan and other)
3. The most recent financial audit was sent to the Diocesan office on _____ (date).

8. THE COVENANT OF MISSION FORM

THE PROJECT: _____
THE CONGREGATION or ORGANIZATION: _____

(TO BE COMPLETED BY MISSION FUNDING COMMITTEE)

TYPE OF FUNDING APPROVED: _____
AMOUNT OF FUNDING APPROVED: _____
DATE OF APPROVAL: _____
DATE(S) TO SUBMIT REPORTS/EVALUATIONS: _____

EXPECTATIONS

The Congregation or Organization (represented by appropriate lay leadership)

- ✝ Will be partners in the task of evangelism and/or outreach
- ✝ Will provide application information as requested
- ✝ Will use funds consistent with the approved plan
- ✝ Will provide follow-up reports/evaluations as requested
- ✝ Will attend mission funding workshops as requested
- ✝ Will share its learnings with the Diocese

The Rector/Vicar/Lay Missioner of the Congregation or the Director of the Organization

- ✝ Will support this project or mission initiative, providing staff time where necessary
- ✝ Will interpret and integrate the project's objectives/goals throughout the congregation

The Diocesan Mission Funding Committee

- ✝ Will provide assistance to a congregation preparing a funding application as needed or requested
- ✝ Will carefully evaluate all funding applications
- ✝ Will commit to faithful stewardship of diocesan resources
- ✝ Will assess grant and loan applications within the "big picture" of funding in the Diocese
- ✝ Will celebrate risk and see mission funding as a learning opportunity for the Diocese
- ✝ Will schedule at least one Mission Funding workshop for those receiving grants

The Bishop or Trustees and Council

- ✝ Will provide oversight for and counsel to the Diocesan Mission Funding Committee
- ✝ Will be an active participant in Diocesan Mission Funding processes and decisions

THE PARTNERSHIP

Sr. Warden of Congregation or Board Chair of Organization) (Date)

(Rector/Vicar/Priest in Charge of Congregation or Director of Organization) (Date)

Diocesan Mission Funding Committee Chair (Date)

(Bishop or V-P of Trustees and Council) (Date)

9. REPORTS AND EVALUATIONS

After the Mission Funding Committee, T&C, and Diocesan Convention (as appropriate) have acted positively on an application, the Chair will inform you of the schedule for evaluation and reporting on the project.

For grants and loans up to \$3,000:

You will be asked to make one or two reports to the Committee, at the Committee meeting closest to the period of six months. The Chair will tell you whether one or two reports will be requested and what information is required for the report.

For grants and loans over \$3,000:

The reporting/evaluation schedule will be determined on an individual basis.

For ongoing projects:

The **Mission Funding Application for Renewal** must be submitted by the grant deadline (June 1, 2014). The renewal application must include both a report on the current status of the project and goals for the coming year. The application must also include a copy of your church's balance sheet, income statement, 2013 budget, and proposed expenses for the 2014 mission project. Please also provide a list of any outstanding Marmion Loans.

THE REPORT:

Please reply as fully as possible to the following questions, and refer back to your Project Application Form as needed.

1. How is the project going?
2. Describe where you are currently in the timeline for this project. When do you expect to complete the project?
3. What events and activities have occurred?
4. Who have you reached? (your target audience? Another group?)
5. Have you achieved the goals you intended?
6. What data/measurements have you used to evaluate success and completion of the project?
7. What have you learned so far? Any surprises?
8. How has this project affected the life of your congregation?
9. How has this project affected the life of your local community?
10. Has the amount of funding which you requested and were granted been sufficient for you to complete the project?
11. What resources (non-financial) have you used which might be of interest or help to other congregations in the Diocese?

Please attach a statement of costs/expenditures to date.

THE GOALS:

Please describe how renewed funding for the coming year will enable you to further accomplish your mission goals. Please show evidence that you are intentionally working toward greater local support for your project and are engaged in a process of visioning, long-range planning and goal-setting.

1. What mission goals do you intend to achieve through the renewal of the project?
2. If this is a similar (but not identical) project to this year's, how and why is it different?
3. What measurements will you use to evaluate success and completion of the project?
4. What do you hope to learn from this project in the coming year?

INFORMATION UPDATE FORM (for all renewal requests over \$3,000)

COVENANT OF MISSION FORM (for all renewal requests regardless of amount)

11.. CURRENT COMMITTEE MEMBERS

Committee Co-Chairs

Dr. Betty Blodgett

57 Ironwood Drive

Murray, KY 42071

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Diocesan Controller

Ms. Becky Meyer

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Louisville, KY 40202

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beckym@episcopalky.org