

# *DIOCESE OF DALLAS*

## *JOURNAL OF THE ONE HUNDRED TWENTY- NINTH*

### *ANNUAL MEETING*

*Saturday, November 9, 2024*

*Parish Episcopal School*

*Dallas, Texas*

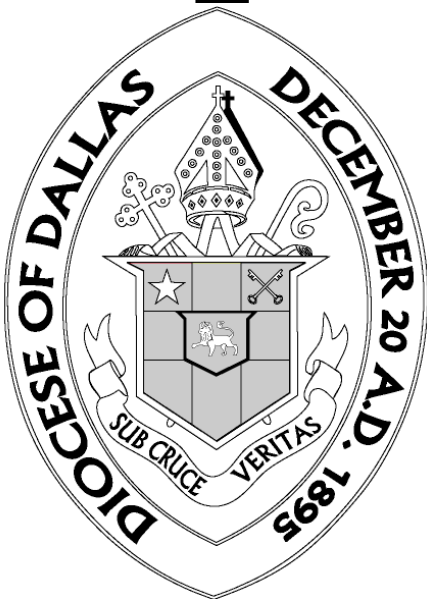
*and*

## *REPORTS TO THE ONE HUNDRED THIRTIETH ANNUAL MEETING*

*Saturday, November 8, 2025*

*Parish Episcopal School*

*Dallas, Texas*



JOURNAL OF  
PROCEEDINGS  
*OF THE*  
ONE HUNDRED  
TWENTY-NINTH  
ANNUAL MEETING  
*OF THE*  
EPISCOPAL DIOCESE  
*OF DALLAS*



SATURDAY, NOVEMBER 9, 2024  
PARISH EPISCOPAL SCHOOL

JOURNAL OF PROCEEDINGS  
OF THE ONE HUNDRED TWENTY-NINTH ANNUAL MEETING  
OF THE EPISCOPAL DIOCESE OF DALLAS

SATURDAY, NOVEMBER 9, 2024  
PARISH EPISCOPAL SCHOOL  
DALLAS, TEXAS

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## DIOCESAN OFFICER DIRECTORY

### DIOCESAN EMPLOYEES

Bishop	The Rt. Rev. Dr.	GEORGE R. SUMNER
Assistant Bishops	The Rt. Rev. Dr.	FRASER LAWTON
	The Rt. Rev.	MICHAEL G. SMITH
Canon Evangelist	The Rev Cn.	CARRIE BOREN HEADINGTON
Youth Missioner & Camp All Saints Director	The Rev. Cn.	KATIE GERBER
Canon Pastor	The Rev. Cn. Dr.	DAVID PETRASH
Theologian-in-residence	The Rev. Cn. Dr.	VICTOR LEE AUSTIN
Archdeacon	The Ven.	ROSEMARY TREI
Executive Assistant to the Bishop		HALEY ROSSI
Executive Assistant to the Canon to the Ordinary		AMY MACEO
Director of Communications		KIMBERLY DURNAN DAVIS
Missioner for Diocesan Services		SUSAN LEE MILLS
Missioner for Finance and Budget		BECKY ROACH
Hospitality and Resources		ERICA LASENYIK

### CONVENTION OFFICERS

Secretary to Convention	ROBERT BUCHANAN
Treasurer	REBECCA WELLBORN
Chancellor	CORY FLOYD
Registrar	SUSAN LEE MILLS
Parliamentarian	ELLEN WILLIAMSON
Assistant Secretary	AMY MACEO

### CHANCELLORSHIP

Chancellor	CORY FLOYD
Vice Chancellor	ELLEN WILLIAMSON
Assistant Chancellors	CHRISTOPHER "CHRIS" AYRES
	ROBERT "BOB" CHADWICK JR.
	MICHAEL B. JOHNSON
	ELIZABETH KINCAID
	TRACY POUNDERS
	SARAH TORAASON
	M. CHAD TRAMMELL

**THE CORPORATION OF THE EPISCOPAL DIOCESE OF DALLAS BOARD OF TRUSTEES**

Chair	The Rt. Rev. Dr.	GEORGE R. SUMNER	
President		WILLIAM BEECHERL	(term ending 2024)
Vice President		AL NIX	(term ending 2027)
Treasurer		G. THOMAS GRAVES	(term ending 2024)
Secretary		SUSAN LEE MILLS	
Members		PAT BOSTIAN	(term ending 2025)
		TIMOTHY BOSWELL	(term ending 2025)
		DUDLEY MURREY	(term ending 2028)
		CHIZOMA IHEKERE	(term ending 2028)

**STANDING COMMITTEE**

President	The Rev.	CLAYTON ELDER	(term ending 2024)
Members		LEE SPENCE	(term ending 2024)
	The Rev.	PERRY MULLINS	(term ending 2025)
		JOLAYNE LACOUR	(term ending 2025)
	The Rev.	TERRY REISNER	(term ending 2026)
		TOM GRAVES	(term ending 2026)
Clerk		AMY MACEO	

**EXECUTIVE COUNCIL**

President	The Rt. Rev. Dr.	GEORGE R. SUMNER
President of the Standing Committee	The Rev. Dr.	SAMIRA PAGE
Treasurer		REBECCA WELLBORN
Secretary		FRED ELLIS
Members (term ending 2024)	The Rev.	DAVID MILLER
	The Rev.	NORMAN "KEITH" TURBEVILLE
		FRED ELLIS
		REBEKAH GARDNER
		MARGOT HABIBY
		MATTHEW "MATT" LEWIS
Members (term ending 2025)	The Rev.	MIGUEL CARMONA
	The Rev.	OLIVER LEE
		CONNIE CRIST
		BETH HANKS
		ADELE ICHILIAN
		ROSSI WALTER
Members (term ending 2026)	The Rev.	IAN HYDE
	The Rev.	KATE SMITH

	EBENEZER NDUKWE
	HAL RICHARDS
	CHRISTOPHER SCHMIDT
	SARAH SHAFER

#### 2024 CONVOCATION CHAIRS

Central	The Rev. KENNETH H. BRANNON
Eastern	(VACANT)
Northeastern	The Rev. SUSANA WILLIAMS
Northern	JERRY FILLEBROWN
Southern	The Rev.
Western	The Rev. SAM ADAMS

#### DELEGATION TO THE 81ST GENERAL CONVENTION (2024)

Bishops	The Rt. Rev. Dr. GEORGE R. SUMNER
	The Rt. Rev. Dr. FRASER LAWTON
	The Rt. Rev. MICHAEL G. SMITH
Clergy Deputies	
	The Rev. Dr. MATTHEW S.C. OLVER
	The Rev. IGNACIO GAMA
	The Rev. Cn. JERRY MORRISS
Lay Deputies	JOLAYNE LACOUR
	REBECCA WELLBORN
	LEE SPENCE
	BEN LIMA
Clergy Alternates	The Rev. CHRISTOPHER STEELE
	The Rev. PAUL NESTA
	The Rev. REBECCA TANKERSLEY
	The Rev. CYNTHIA MOORE
Lay Alternates	CONNIE CRIST
	ADELE ICHILIAN
	FRED ELLIS
	JESSE DAVIS

## **2024 CONVENTION COMMITTEES**

### **Convention Arrangements Committee**

The Rt. Rev. George R. Sumner, Bishop  
Mark and Terry Demler, Co-Chairs  
Monica and Michael Huggins, Assisting Co-Chairs  
The Rev. Robert M. Corley, Worship Chair  
The Ven. Rosemary Trei, Archdeacon  
Adele Ichilian, Exhibits  
Ellen Williamson, Parliamentarian  
Kimberly Durnan  
Erica Lasenyik  
Amy Maceo  
Susan Lee Mills  
Rebecca Roach  
Haley Rossi  
Cassandra Roberts

### **Constitution & Canons**

Cory Floyd

### **Credentials & Registration**

Jolayne LaCour, Chair  
Cassandra Roberts  
Kenneth Keith

### **Dispatch of Business and Resolutions Committees**

The Rev. Paul Nesta

### **Elections Committee**

Ellen Williamson, Parliamentarian  
Cassie Roberts, Registrar

### **Nominating Committee**

The Rev. Tom Smith, Chair  
The Rev. Ian Hyde  
The Rev. Nancy Powers  
The Rev. Matt Rossi  
Chelsea Anderson  
Pat Bostian  
Gary Brown  
Terry Demler

# **PROCEEDINGS OF THE 128TH ANNUAL CONVENTION OF THE EPISCOPAL DIOCESE OF DALLAS**

The Rt. Rev. Dr. George R. Sumner Jr., Bishop of Dallas, served as Chair of the Convention and called the Convention to order.

After an opening prayer, Bishop Sumner welcomed all lay and clergy delegates and guests to the Convention, offering formal thanks to Parish Episcopal School, whose headmaster, Matthew Rush, extended his greetings. Bishop Sumner then thanked Dr. Garwood Anderson and the Rev. Dr. Justin Holcomb for their teaching at Convention Leadership Day at St. Matthew's Cathedral the day prior, the Rt. Rev. Lloyd Allen for celebrating and preaching at the preceding Holy Eucharist, all acolytes and other assistants at the service, the youth volunteer pages and their coordinators.

The Chair next recognized Ms. Jolayne LaCour to present the report of the Committee on Credentials. Ms. LaCour indicated that there were 97 clerical delegates and 149 lay delegates representing 53 parishes and missions registered to vote. The report was adopted without dissent, and the Chair accordingly declared a quorum present in both orders.

The Chair then recognized the Rev. Paul Nesta, chair of Dispatch, to present the report on the Rules of Procedure, reproduced below.

## **RULES OF PROCEDURE FOR THE ANNUAL CONVENTION**

### **Presiding Officer**

1. The Bishop or such other person as provided in the Constitution and Canons of the diocese shall serve as presiding officer. The presiding officer may call to the chair any qualified person to relieve him temporarily. The presiding officer shall have full power and authority to take such action (consistent with the Constitution and Canons) as he deems necessary to expedite the orderly disposition of the business of the Convention.
2. After the Convention is called to order by the presiding officer, an opening prayer shall be offered by the presiding officer or someone designated by him.
3. The presiding officer shall have the authority to appoint a parliamentarian of his own choice to advise him on parliamentary questions arising during the Convention.
4. Any person addressing the chair or desiring recognition of the chair while the Convention is in session shall address the chair as "Right Reverend Sir" if the bishop is in the chair. If some other person is in the chair, he shall be addressed as "Mister/Madam President."

### **Committees**

5. In addition to the Nominating Committee provided for elsewhere in these Rules, the Ecclesiastical Authority, within a reasonable length of time before the convening of the Annual Convention, may appoint from among the officers and staff of the Diocese, the delegates of the Convention, and such other confirmed persons in good standing as the Ecclesiastical Authority may designate, the following committees: Arrangements, Credentials, Dispatch of Business, Constitution and Canons, and Elections. Each committee shall consist of a chair and such other members as the Ecclesiastical Authority may determine. Each committee shall perform such duties as may be deemed necessary or advisable to facilitate the business of the Convention and any specific duties assigned to such committee by the presiding officer or under the Constitution and Canons or these Rules. Members of these committees shall continue in office until their respective successors are appointed.

### **Order of Business**

6. The order of business to be presented to the Convention for adoption shall be established by the presiding officer in accordance with the Constitution and Canons.



7. Any item of business of the Convention may be set as a special order of business or taken up out of its regular order at any time by a two-thirds vote of the delegates. Subject to the foregoing, the presiding officer shall have the authority, within his discretion, to deviate from the order of business adopted, as the exigencies of the occasion may require.

8. After being organized and ready to proceed to business, the first order of business shall be the election of a Secretary and one or more Assistant Secretaries, if needed.

9. All Resolutions of Substance (thus exempting Resolutions of Courtesy) shall be submitted to the Secretary of Convention no later than 10:00 in the morning of the first regular business day. Such resolutions shall be submitted in writing (a) with enough printed copies for distribution to all voting delegates and (b) in electronic form, on a portable memory device. If the resolutions mention outside data, resolutions, etc., copies of such material shall be made available to those requesting same. Such resolutions shall be referred by the presiding officer to the Committee on Dispatch of Business. The Committee shall give due and timely consideration to such resolutions and reports and, with reasonable dispatch, make its report thereon back to the Convention with its recommendation for final disposition on any such resolution or report.

#### Conduct of Business

10. A delegate desiring recognition of the Chair shall give his/her name and the name of the church he/she represents.

11. A delegate may use the microphone on the stage of the Convention only with the permission of the presiding officer.

12. A delegate making a report or debating shall go to the designated microphone. At the discretion of the presiding officer, microphones may be designated "pro" and "con" to expedite debate. A third microphone may be utilized for procedural motions and questions.

13. To expedite the business of the Convention, debates on any pending resolution or motion shall be limited to three minutes per speaker, and one person shall not speak more than once on the pending matter until all other persons who so desire have had an opportunity to be heard. No member shall speak more than two times to any one motion. The number of speakers for discussion shall be divided, as near as is practical, equally between the proponents and opponents of the pending subject.

14. A question having been decided shall not be reconsidered at the same Convention without the consent of two-thirds of the members present, nor without a motion for that purpose being made by one of the majority on the prior decision. No question shall be reconsidered more than once.

15. If required by the presiding officer, any motion shall not be considered as before the Convention unless reduced to writing.

16. When any proposed amendment to the Constitution or Canons is before the Convention, amendments thereto may be sent up from the floor if, within the judgment of the presiding officer, such floor amendments are germane to the pending amendments and do not change the purpose of such pending amendments.

17. When consideration of the proposed Diocesan Budget is before the Convention,

(a) each amendment thereto must indicate the specific line item(s) being increased and/or decreased, and

(b) the aggregate dollar amount of changes proposed must be offsetting.

#### Reports

18. All reports, which have been printed and distributed in advance to all members of the Convention, shall be presented by title only and not read; however, any person presenting such a report may give a summary of it requiring not more than five minutes delivery.

19. The budget materials prepared for Convention shall include both descriptions of line items and rationale for changes in funding or deletions of line items from the budget of the previous year.

#### Nominations

20. The Ecclesiastical Authority shall appoint, not less than 60 days in advance of each Annual Convention, a Nominating Committee composed of four clergy and four lay persons resident in the diocese, which shall report to the Convention nominations for all elective offices (other than those for which the Bishop makes the nominations) in accordance with the following provisions:

- (a) Except as to the Office of Secretary, Trustee of the University of the South, and President of the Disciplinary Board, there shall be nominated not less than two nominees for each office.
- (b) There shall be obtained from each nominee presented his/her personal assurance of his/her willingness and availability to serve, if elected.
- (c) The name of each nominee shall be accompanied by suitable brief biographical data, including a listing of parish, mission, and diocesan offices then and previously held.
- (d) Suggestions as to persons for consideration shall be sought from parishes, missions, and diocesan institutions, and from individuals.
- (e) Further nominations for any office may be made on or before the first regular business day of Convention. All such nominations must be submitted in writing on the prescribed nomination form to the Secretary of the Convention no later than the call to order of the first business session of the Convention; and accompanied by the copies of the biographical information required in sections (b) and (c) above with a sufficient number of nomination forms and biographical sheets for delivery equal to all lay and clerical Convention Delegates; and accompanied by the signatures of the nominator and the nominee. The Secretary of the Convention shall certify that any nominations so received are in good order and satisfy the requirements set forth in sections (b) and (c) above.

After the Nominating Committee makes its report for each office to be elected, in succession, the Secretary of the Convention shall announce the names of the additional nominees for the same offices whose names have been placed in nomination according to the provisions of this rule and shall distribute the nomination forms and biographical information on those so certified to all Convention Delegates. No seconding speeches or endorsements of any candidate shall be allowed. Nominations made according to the provisions of this rule shall be added to the election ballots of delegates according to the direction of the Chair of the Election Committee and thus eligible for election as the vote for each office proceeds. A nominee (or in his absence at the Convention, the Rector of the nominee's Parish) may withdraw his name from consideration at any time.

#### Voting and Elections

21. When two or more equal positions are voted on simultaneously, a nominee must receive a majority of the total number of legal votes cast for such office. In the event a majority is received by more candidates than there are positions to be filled, those with the highest legal vote totals shall be elected.

22. In the election of persons wherein a concurring majority of both orders is required, in which only the number of persons required to fill the position or positions under consideration have been nominated, the bishop, by unanimous consent of the Convention, may declare the candidates elected.

23. The Ecclesiastical Authority shall have the authority to appoint all Board Members, Trustees, and Committee Members, and fill other positions which are not required to be elected or otherwise selected by the Constitution or Canons of the Diocese of Dallas or any other lawful authority.

24. If a nominee receives the fewest votes in both the lay and clergy orders on the first or any subsequent ballot, that nominee shall be removed from the ballot on the next round of voting.

25. Voting will be conducted in accordance with the following procedures:

- (a) At the time of registration, each delegate shall be issued: (i) a yellow voting card to each lay delegate and a blue voting card to each member of the clergy and (ii) a yellow keypad card to each lay delegate and a blue keypad card to each member of the clergy.
- (b) Lay delegates and members of the clergy shall enter the Convention floor through doors marked "clergy" and "lay," respectively. Upon entrance to the Convention floor for business sessions, each delegate will exchange his keypad card for a voting keypad.
- (c) If a delegate loses a voting card or keypad card, he must return to the registration desk for replacement.

- (d) When directed by the presiding officer, a delegate shall vote by either (i) using the keypad or (ii) raising a voting card, as directed by the presiding officer.
- (e) Doors shall be closed during voting and entry to the Convention floor shall be denied until ballots are collected, or, if not a ballot vote, until the results of the vote are announced.
- (f) Upon exiting the Convention floor, each delegate will exit only through the designated door and shall exchange his/her keypad for a keypad card.
- (g) In case of a malfunction of electronic voting equipment, the presiding officer shall establish procedures for voting by paper ballot or other means.
- (h) If deemed appropriate by the presiding officer, the presiding officer shall appoint sufficient number of tellers to count voting cards raised on any vote.
- (i) Elections shall be conducted under the oversight of the Elections Committee and the presiding officer may delegate authority to establish additional voting procedures to such committee.

#### Miscellaneous

- 26. The presiding officer, or such person as he may designate, shall be in charge of the admission of all media personnel to the Convention floor, and no TV or video cameras shall be permitted on the floor without the prior approval of the presiding officer.
- 27. No literature shall be distributed at the Convention, on the floor or on the premises, without prior approval of the presiding officer.
- 28. The audible use of cell phones and other personal accessories shall not be permitted during sessions of the Convention.
- 29. The proceedings of the Convention shall be tape recorded and permanently filed. The Journal of the Convention shall be reviewed and approved by a committee consisting of the Secretary, the Chancellor and the Parliamentarian.
- 30. Any of these rules may be suspended by a two-thirds vote of the delegates. These rules may be amended by a two-thirds vote of the delegates, provided such amendments are not in violation of the Constitution or Canons of the Diocese.
- 31. The Constitution and Canons Committee shall be authorized to correct article, canon, and section designations, numbering, grammar, punctuation, and cross-references and to make such other technical, typographical, and conforming changes that will not change the meaning or intent of an amendment or resolution as may be necessary to reflect the intent of the Convention in approving the amendment or resolution.
- 32. The Rules of Procedure of the previous meeting of Convention shall be in force until they are amended or repealed.

\* \* \*

After adoption of the rules of procedure without objection, Fr. Nesta presented the proposed agenda, which was approved unchanged:

### PROPOSED AGENDA

#### Saturday, November 4, 2023

- 7:30am Registration, Exhibits Open, Coffee and Continental Breakfast
- 8:30am Festival Eucharist in Chapel with guest celebrant, the Rt. Rev. Dr. George Sumner, Dallas and guest preacher, the Rt. Rev. Lloyd Allen, Honduras
- Call to Order in Convention Hall (Gymnasium)
- Report of the Credentials Committee
- Quorum Report (Report of the Dispatch of Business Committee)
- Report of the Nominating Committee
- Election of Secretary and Chancellor

	Bishop's Convention Appointments
	Approval of 2023 Minutes
	Second Report of the Nominating Committee
	Election Procedures and Voting
	Bishop's Address
12:00pm	Noonday Prayer and Recess for Lunch (Provided)
1:15pm	Convention Reconvenes
	Report of the Credentials Committee (Updated Quorum Report)
	Corporation Business
	Report of the Constitution and Canons Committee
	Report of the Resolutions Committee
	2025 Budget
	Courtesy Resolutions
	Closing Prayers and Adjournment
	Blessing and Dismissal

\* \* \*

Given the adoption of all preliminary reports (Credentials, Rules of Procedure, and Order of Business), the Chair announced that the Convention was duly organized and ready for the transaction of business.

The Chair then recognized the Rev. Tom Smith to present the nominating committee's first report. Mr. Bob Buchanan was elected as secretary without dissent.

### **FIRST REPORT OF THE NOMINATING COMMITTEE**

**Secretary to Convention**  
Mr. Bob Buchanan

Thereafter, the following convention nominations were approved to four-year terms without dissent:

### **BISHOP'S CONVENTION OFFICER NOMINATIONS**

<b>Chancellor</b>	<b>Registrar</b>	<b>Historiographer</b>
Cory Floyd	Kenneth Keith	Dealey Campbell

The Chancellor, Secretary and Parliamentarian were selected as the committee for recognition of minutes without objection.

After a tutorial on the voting devices and test vote, Fr. Smith was again called to present the second report of the nominating committee. After an updated credentials report indicating no update to the initial report, elections were conducted and results announced.

### **SECOND REPORT OF THE NOMINATING COMMITTEE**

#### **Standing Committee**

Clergy (elect one)  
The Rev. David Halt  
The Rev. Paul Nesta

Lay (elect one)  
Connie Crist  
Tim Mack  
Lon Williams

**Executive Council**Clergy (elect two)

The Rev. Tyler Been

The Rev. Drew Crowson

The Rev. Jacob Nichols

The Rev. Christopher Thomas

The Rev. Patrick Webb

Lay (elect four)

David Aughinbaugh

Dabney Dwyer

Susan Gelinger

Cindy Kent

Heather Lorch

Jeff Shaw

Brad Smith

Katy White

**University of the South (Sewanee) Trustee:** Clergy (elect one)

The Rev. Nicholas Funk

**President of the Disciplinary Board:** Priest (elect one)

The Rev. Christopher Steele

**ELECTION RESULTS**

\*In order of election; note that individual ballot tallies are listed at the end of the minutes.

**University of the South (Sewanee) Trustee:**

The Rev. Nicholas Funk

**President of the Disciplinary Board:**

The Rev. Christopher Steele

**Standing Committee**Clergy

The Rev. Paul Nesta

Lay

Tim Mack

**Executive Council**Clergy (elect two)

The Rev. Tyler Been

The Rev. Patrick Webb

Lay (elect four)

David Aughinbaugh

Heather Lorch

Brad Smith

Katy White

As results were being tabulated, the chair thanked all diocesan officers and those who put their names forward for election and subsequently recognized the Rt. Rev. Michael Smith, Assisting Bishop of Dallas, to report on clergy changes within the diocese:

\* \* \*

**Clergy Changes Report to the 129<sup>th</sup> Annual Convention  
November 9, 2024****Since November, 4, 2023 Convention:**

Ordained Deacon:

- The Rev. Andrew Crowson
- The Rev. Jordan Griesbeck

January 21, 2024

September 7, 2024

Ordained Priest:

- The Rev. Patrick Webb

November 18, 2023

- The Rev. Louis Harris April 20, 2024
- The Rev. Andrew Crowson August 17, 2024
- The Rev. Juana Lara September 28, 2024

Deaths:

- The Rev. P. Larry Murphy, Jr. January 10, 2024
- The Rev. Raleigh Denison Jr. March 22, 2024
- The Rev. Canon Courtland Moore May 5, 2024 (licensed)
- The Rev. John Thomas Wells, Jr. June 10, 2024 (licensed)
- The Rev. Ralph McCune September 26, 2024

Newly Canonically Resident or Received into TEC:

- The Rev. Robin Hansen Hinkle December 6, 2023
- The Rev. Carolyn Bartkus December 19, 2023
- The Rev. Leo Loyola February 7, 2024
- The Rev. James Detrich September 4, 2024
- The Rev. Dr. Thomas Papazoglakis September 9, 2024
- The Rev. Dr. Elizabeth Papazoglakis September 9, 2024
- The Rev. Dr. Jeffrey Boldt October 24, 2024

Newly Licensed:

- The Rev. Yehoshua Odidi
- The Rev. Christopher Heying

Other Changes since Convention 2023: *(with apologies for any omissions)*

- Carolyn Bartkus, Church of the Annunciation
- Tyler Been, Rector, Holy Cross, Paris
- Drew Crowson, Curate, St. Paul's, Prosper
- James Detrich, Vicar, St. Paul, Waxahachie
- Katie Gerber, Deacon, St. Matthew's Cathedral
- George Joseph, Interim Vicar, Our Merciful Saviour, Kaufman
- Lillian Kamau, Associate, St. Philip's, Frisco
- Leo Loyola, Rector, Redeemer, Irving
- Jacob Nichols, Rector, St. Luke's, Denison
- Elizabeth Papazoglakis, Priest-in-Charge, St. James on the Lake, Kemp
- Thomas Papazoglakis, Priest-in-Charge, St. Matthias, Athens
- Terry Reisner, Rector, Epiphany, Richardson
- Marci Pounders, Retired
- Craig Reed, Retired
- Mark Wright, Retired

\* \* \*

Bishop Smith offered a prayer for departed clergy.

The following other activities took place during the voting and tabulation: The Chair invited the Rt. Rev. Dr. Wayne Smith, assisting bishop of Dallas, to extend a greeting to Convention. Bishop Smith offered a reflection on the life and teaching of Dietrich Bonhoeffer, the vocation of a bishop, and the exigencies of communion across difference. Fr. Fabian Villalobos of Christ Church Dallas offered remarks on ministry in a bilingual community, the task of welcoming Latino and Hispanic Christians into The Episcopal Church, and the necessity of Christian hospitality. Mr. Andy Welch, board chairman of the Episcopal Foundation of Dallas, gave a presentation about the mission and current activities of the Foundation; the \$25,000 Trustees' Award was presented to the Church of the Ascension, Dallas. Finally, a video was presented highlighting the ministry at Iglesia de San Marcos, Mt. Pleasant.

The Chair then recognized Mr. Bob Buchanan, secretary of Convention, to report on the Bishop's nominations and appointments. The Convention recessed as the diocesan annual meeting and reconvened as the annual meeting of the Corporation of the Episcopal Diocese of Dallas. Will Beecherl and David Pinson were elected to the Corporation's Board of Trustees for a five-year term.

The Convention adjourned as the Corporation's annual meeting and reconvened as the diocesan annual meeting. Mr. Buchanan moved that the rest of the Bishop's nominations to diocesan committees be approved in a single vote, which was approved.

## **2024 BISHOP'S NOMINATIONS**

### **Corporation of the Episcopal Diocese of Dallas, Board of Trustees**

#### **Nominations to a three-year term ending 2027:**

Will Beecherl  
David Pinson

### **Audit Committee (Canon 8.5)**

#### **Nominations to a one-year term ending 2025:**

Mary Sonom, Chair  
Tom Graves  
William Peeler  
The Rev. Bob Corley

### **Commission on Ministry (Canon 30)**

#### **Nominations to a three-year term ending 2027:**

Brice Beaird  
Mary Jo Hoch  
Ed Hurst  
The Rev. Tom Smith  
The Rev. Lillian Kamau  
The Rev. Dr. Elizabeth Papazoglakis

### **Commission on Episcopal Schools (Canon 37)**

#### **Nominations to a three-year term ending 2027:**

The Rev. David Halt  
The Rev. David Houk  
The Rev. Michael Mills  
Patricia Morris

\* \* \*

## **PARISH AND MISSION STATUS UPDATES**

The Chair then reported on the six mission stations of the diocese in accordance with Canon 15.7: Holy Trinity, Bonham; San Marcos, Mt. Pleasant; St. Francis, Winnsboro; St. Justin Martyr, Canton; Grace Community, Plano; and Our Saviour, Dallas.

Between conventions, Holy Trinity Garland was transferred from parish to mission status.

The Chair offered his thanks to donors to the Convention's food and clothing drive and acknowledged several exhibition booths present. After making some administrative announcements, the Chair called a recess for lunch. The Rev. Julian Borda offered a prayer.

Upon reconvening, Bishop Sumner offered further thanks to the Demler family, diocesan staff and councils, assisting bishops, and the search committee for a bishop coadjutor. The Rt. Rev. Dr. George R. Sumner Jr., Bishop of Dallas, then offered his address.

### BISHOP'S CONVENTION ADDRESS 2024

Good morning, **mis hermanos y hermanas, compañeros todos**. Before I begin my address, and in the spirit of 'eucharist,' I want to offer **gracias especiales**. We are grateful to Parish School for their hospitality. The Demlers have done a great deal behind the scenes to make today possible. The diocesan staff has again done yeoman's work. The officers of the diocese are gifted, hard working and indispensable- Cory, Rebecca . A hearty thank you to the Finance Committee, the Commission on Ministry lead so ably by Sandy, Real Estate and Church Planting. I speak of all in expressing our appreciation for all our parish clergy, for our remarkable deacons, for the grey eagles our retired clergy, wardens and vestries. I have depended on the wise counsel of Father Clayton and the Standing Committee. We appreciate those on Executive Council giving of themselves. A special thank you this year to those involved in the disciplinary process- Tim, Rebecca, Oliver, Andrew, Nancy, and George. This year, I want to thank in advance our Search Committee. Finally gracias to all of. You delegates on this beautiful November Day.

We of course meet in the shadow of the election, about which there are surely various strong feelings in this room! I will limit myself to this quotation from the greatest public theologian in our history, Abraham Lincoln, the conclusion of his second inaugural address:

"With malice toward none, with charity for all, with firmness in the right as God gives us to see the right, let us strive on to finish the work we are in to bind up the nation's wounds, to care for him who shall have borne the battle and for his widow and his orphan ~ to do all which may achieve and cherish a just and lasting peace among ourselves and with all nations."

In Christ's name Amen.

This morning we sang one of the great hymn melodies of our tradition, Brother James' Air, 'How lovely is thy dwelling place,' with the words of the 84<sup>th</sup> Psalm, a song of pilgrims on their way to one of the great festivals in the Temple in Jerusalem. *[pic of Jerusalem]* The pilgrimage- it is the shape of the spiritual life, in miniature as each of us, on the Lord's Day, headed to Church, and up to the altar of God. The same pattern is played out yearly, in the journey through Lent to Easter, our accompaniment of the Lord on his way to Jerusalem, the cross, and the empty tomb. And of course, it reminds us of our own journey through all our own days, toward our own passing through the grim portal on the way to the bright kingdom of God.

We humans are journeyers, **peregrinos**, and so we, like the journeys themselves, are defined by our destination. **Nosotros seres humanos somos peregrinos, definidos de nuestro fin**. The beauty of the dwelling place fills the mind of the pilgrim in the dry places described in the psalm. Our life together is defined and encouraged by the feast with the Lord toward which we walk, and by His presence with us, though, walking, we are at times doubtful and discourage. So it was in Luke's story of the disciples on the first Easter evening on the way to Emmaus. *[painting of supper at Emmaus by Caravaggio]* I once heard a preacher describe the great cathedral at Chartres. *[pic of rose window at Chartres Cathedral]* On the floor is the labyrinth winding its way to the rose-colored heart at its center, intimacy and rest with Christ, though at the same time the Rose Window above suffused the winding walk itself with the same color, Christ beside me as well as Christ before me. The tincture of his presence on the journey is, as the Emmaus story reminds us pilgrims, by means of his Word and Sacrament. Along the way of this address, I want to cite the themes and emphases that have been important in our time together in these past nine years. As we all know, it is easy to be lost in the details of our own Church, its local struggles and challenges. But our eyes are, in the psalm, on the prize. The Eucharist lies at the heart of our Anglican piety, the enjoyment of the risen Christ's real presence with us, as well as ahead of us. This pilgrimage of ours had a terrible and remarkable season with the pandemic. *[pic of cars waiting for food in pandemic]* In a strange way, when everything else was for a short time taken from us, so that the sheer and stark mystery of His real presence in the sacrament and the real miracle of His absolution, could be seen more clearly, as in a silhouette.

Another anecdote- the great Southern Roman Catholic writer Flannery O'Connor *[pic of Flannery O'Connor]* was invited to a dinner party with the famous lapsed Catholic writer Mary McCarthy, who called the Eucharist a 'pretty



good symbol,' Church for McCarthy was a quaint evocation of things we have a sense of on our own. But O'Connor memorably replied 'if it's just a symbol I say to heck with it.' We too would defend His real presence at table as at Emmaus. In the same way we share the need to recall, and defend, the realities of the Scripture as God's Word, of his atoning death, of His bodily resurrection, of the primacy of His saving grace, and the urgency to evangelize. These are yet more real. The things of our everyday lives are, to the Christian eye, suggestive of these verities, not the other way around! It is incumbent on the Church as a whole to reclaim these, especially in our relentlessly secular and pragmatic age. This advocacy is not the activity of a faction, but a humble vocation on behalf of the whole Church.

This sustenance O'Connor spoke of is Viaticum [*slide of the word viatico*] in Latin 'a little sustenance for the journey,' a snack. That is what you need if you are a pilgrim out on the road. In that morsel at table in the Emmaus story was taste of the real presence of the risen Christ walking alongside His disciples. **El viatico es suficiente para sustentarnos viajando en el camino del Señor.**

This image of the pilgrim suffuses the Scriptures. In this talk I want to circle back to it four times, to reiterate both what has been of special importance to us as a diocese, and into what terrain do we now commence to travel. We journey, as I say, with our eye fixed on our destination, Jerusalem. Its outlines are defined for us Christians by the Creeds, summing up as they do the Holy Scriptures. The fixing of our sight toward our true goal is what the Church means by 'doctrine.' These creedal affirmations are the common inheritance of all our co-religionists, whatever various theological opinions we may hold. It is not hard to list these: that we all are made in God's image and yet originally sinful, that Jesus is God incarnate, the Way, the Truth, and the Life, whose death dealt with our guilt, and whose resurrection has opened the door of the Kingdom to all peoples and nations.

The Church, in our age as all others, becomes waylaid by the 'winds of doctrine.' In the face of all this, I continue to believe that there is a ministry of recalling, hearing and articulating once more, the great doctrines which make up what C. S. Lewis called 'mere Christianity.' This is a ministry for the whole Church, not against it. It is more urgent in a culture of growing forgetfulness and social media driven illusion. The Communion Partners [*slide of the logo of the Communion Partners*] is but one example of a group committed to this remembering, and I remain convinced that this ministry of teaching is of great importance. We in this diocese have endeavored to pursue this essentially catechetical, that is, teaching, ministry in a spirit of friendship and charity. The Episcopal Church needs those with a vocation of theology, needs help to remind tied to the Cross against the sirens of unqualified experientialism, consumerism, and pluralism, challenges for all of us no matter our positions on the controverted issues of our time.

We live in a particular moment in our Church's life. A generation has struggled over the teaching on marriage. Our Prayer Book remains unchanged. But now we are headed in 2027 toward a new agreement, to live with two teaching, which is in itself a confusing thing. But it also means to live in peace. We will probably have a diversity of practice at the parish level. The best way to understand this will be to see it as a time of what the Church calls 'reception,' when it decides what it makes of a new teaching, and this period may continue for a long time. What we believe to be true on this question, and others also contested in our culture, still matters. Theological implications remain. We will disagree. But we have as a Church resolved to live together peaceably with this 'Communion Across Difference,' brought to fruition, I might add, by creative minds in our own diocese. We are a Church walking with difference, though not discarding theology, walking in patience, the Peace of Louisville [*pic of General Convention Louisville*]. We offer our witness on the doctrine of marriage, bearing in mind as we do the received witness and the ancient inheritance. To be sure, on the larger credal questions, we pilgrims walk together with a wider band of companions, witnessing on behalf of the whole of the common body. **Estamos caminando y testigando sobre la doctrina de nuestro centro y nuestro fin, por el bien mas general del cuerpo de los fieles.**

**Peregrinos en el camino.** Two generations ago, a professor named Robert Webber of Wheaton College, [*slide of Robert Webber*] observed that a number of young evangelicals were drawn to the tradition, to the longer history, to the liturgy, the theologians of the early Church, to a more ancient spirituality, and in particular Anglicanism, with its dual streams, evangelical and catholic. Many came to be ordained, Webber wrote an influential book entitled Evangelicals on the Canterbury Trail. **El libro de Robert Webber llama 'Los Evangelicos en el camino de Canterbury,' expresando un movimiento importante por nosotros tambien.** A later book called 'Ancient Future Worship' filled out what he envisioned. How exactly this convergence is understood and lived out has varied, but the important point for us is a simple and obvious one: the Canterbury Trail has been wide open here in the Diocese in recent years, and is vital to us moving into the future. This trail of ancient-future ordinands has a great deal to do with our distinctive and what I would call a 'retrievalist' profile, even as we are full participants in the common life

of our Church. I like to remind those coming into our Church not to leave the distinctives of their evangelical heritage behind- attention to Scripture, evangelism, an emphasis on conversion. We need these! (And these are not actually alien to us, since our own Prayer Book has Reformation roots, and the Wesleyan revival was begun, after all, by an Anglican priest, as I pointed out at length last year!) *[slide of John Wesley]*

These would seem to be exactly the gifts most critical for leadership in the era in which we live. But to say this is to read the situation in which we find ourselves in a particular way. This leads to my third Camino image, after Camino1, journeying to Jerusalem, and Camino2, Ancient Future emergence. Third might be called Camino proper, wayfarers, including searchers, vacationers, outdoor types, walking across Spain on their way to the shrine of St. James Compostela. I am tempted to call Father Victor Austin forward, *slide of victor on the camino* since he has written compellingly of the walk as a metaphor for the Christian life. Stephanie and I were planning to try the walk just when COVID hit, and the plan, like so much else, went by the boards. We hope to do it yet, though a bit less ambitiously, in retirement. But for our purposes here, I want to focus on the hospitality that the peregrino receives along the way. He or she can duck into albergue, a hostel, a casita, along the route. There is found welcome, a meal, as well as some feel for the locale, the pueblo through which you journey. It is not only the goal that matters, but the passage, **el pasaje**, the neighborhood through which God gives the pilgrim to travel. The image here is the **Camino** proper, the religious pilgrimage which sees also a cross section of the people and towns and cultures that surround the traveler. **Igualmente los pueblos los que los peregrinos se atraviesan son importante. Su alrededor tambien influye nuestra mision.**

This image of the medieval pilgrim on the way to the religious shrine is of course also an Anglican one, Webber was alluding to.. We all probably read some of Geoffrey Chaucer's Canterbury Tales in high school, *[pic of the pilgrims on the way to canterbury]* and learned of the motley band on their way to the place where Archbishop Thomas a Becket was murdered in the cathedral near the altar in the 12<sup>th</sup> century (the Sumner happening to be one of the most motely of the gang!). Canterbury as Camino reminds us in Dallas that we are global Christians, Communion Christians. At the same time that the globe is here, in a remarkable diversity, in our region, not to mention the global diversity of our diocese itself, as we pray weekly in Urdu, Farsi, Igbo, Dinka, and Spanish, with energetic new curates who hail originally from Kenya and Nigeria, also the home of our bishop in residence, not to mention our own Father Jeff and Jenn Boldt ministering in Cairo, along with a raft of other connections.

We can follow this line of thought a step further: who are the neighbors along the way who also influence our mission in 2024 in the diocese of Dallas? We are setting back out on the road of church planting, in the growing suburbs around Dallas. We need to seize this moment and its opportunity as new communities sprout like mushrooms around us. I am most grateful to Real Estate, Church Planting, the Corporation, to Father Crowson our planter, and his launch pad at St. Paul's. Prosper *[tom and drew]* but his eyes on Celina. *[Celina]*. It is its own mission field, with the one key difference that is not yet chock a block with churches.

What are the other albergues, what are the pueblos along the way, among which we must understand? One answer is underscored by this convention with our celebration of our Latino congregations. We live in a culture of two languages, with a long and complex history. The demographers tell us that by mid-century the people of this state will be more than 50% of Spanish background, but we don't need a demographer to understand the missional opportunity and imperative. In the past year, due to our remarkable Latino clergy we have started a new parish based model of study with the Stanton Institute, renewed the campus and ministry at Holy Family/ Santa Natividad, approached parish status, soon, at San Francisco, welcomed a Latina priest at San Bernabe, seen new aspirants at Santa Maria, and seen social outreach to the community out of San Marcos. *{a couple of pics}* **Generalmente hemos visto vida nueva en nuestras congregaciones Latinas, entonces necesitamos planear proximos pasos en el camino del desarroyo del ministerio.**

It is so easy in Church work to be overwhelmed by the needs, and the possibilities, of our own shop, as if we were our own franchise of Christian. But of course we know, by virtue of the ecumenical movement, that we as Church are wider than one denomination. We depend on our Roman Catholic brothers and sisters not least for their social witness in advocating for refugees and migrants (a ministry we too have a hand in by supporting Gateway of Grace). We value of friendships with other denominations. We are growing together with predominantly African American Churches in our diocese, with the help of our diocesan evangelist Carrie Headington, through links like the Greater Dallas Coalition *[pic of greater Dallas coalition]* and the Lilly Foundation leadership grant that our Dean Rob Price was instrumental in obtaining. This begins as an ecumenical vocation- we are Christians together, and need to be

reminded on the one hand that there can be no black or white Church of Jesus Christ, and yet, as Dr. King famously said, Sunday morning is the most segregated time in America. We are called to unlearn our own sociology. But then we are called yet further- we need to learn our own blind spots, as well as the inbuilt inequities of our society, through the eyes and the witness of our brothers and sisters. To this end our Racial Reconciliation Taskforce has asked the Rev. Markus Lloyd to help us again with a diocesan process of reflection in the new year.

In addition to these neighbors, we also live in a time of polarization, secularization, and alienation. In the past year our mission day had an opportunity to think about 'the Great dechurching,' the decline of Church attendance and awareness of things Christian. [*book cover the great dechurching*']. **Vamos a entrar la temporada llamada 'la gran salida de la iglesia' en la historia de Estados Unidos.** There is no little anxiety in our denomination, and we have a new presiding bishop who has thought a great deal about how we can respond structurally. We feel the effect here quite tangibly when smaller churches try to find a past-time priest. But we need to face this challenge theologically and evangelistically, not to mention turning for help to our impressive younger generation of leaders. Ultimately it is, as always, a matter of articulating the saving Gospel of Jesus Christ. the Risen One moved through walls, and so he can move through whatever technological and psychological obstacles our time presents.

An event from the recent past can help us here. The Roman Catholic Church held its Second Vatican Council, around 60 years ago, whose effects and counter-effects we are still feeling. [*Pope John 23*] Then and always, the mystery of the Church needed to be understood with the help of several models, but the dominant picture came to be the 'People of God.' **En el Concilio Vaticano Segundo, llamado de Papa Yohan 23, la imagen primera de la iglesia era el Pueblo de Dios. [*El Pueblo de Dios*]** Part of the biblical basis for this model was the people wandering, through the wilderness on the way to the promised land. **Especialmente el Pueblo de Dios atravesando el desierto.** The implications of a people sojourning is that they must travel light, they must live humbly, they give and take hospitality in inauspicious surroundings, and they take sustenance from their Biblical promise that they are indeed **El Pueblo de Dios**.

Wait a minute, the listener might say. What of the idea of a parish, with a building, planted in a location, physically gathered, all of which now is doubly crucial to witness against the new Gnosticism of our technological age? How can we be a peripatetic people, on the move, and at the same time, a people with the stability of our Benedictine forebears? To which I answer- good question! Struggle on with it. You will find help in the Epistle to the Hebrews, where the pilgrim people carry their rest, their Sabbath, their foretaste of eternity along with them with them on the way. Such will be the spirituality our rising generation, working this out with fear and trembling.

The people of God of course went into exile, a state that has proved evocative of our own predicament. There the prophet Isaiah borrowed the image of crossing the Red Sea to imagine a new exodus, wherein they would cross the desert anew, back toward home. As pilgrims, forgiven, healed, restored, the images of sailor and trekker, converged. There is another convergence here too, between going home and setting out into the unknown. We as Christian missionaries are always doing both. At the end of the Gospel of John, Peter, betrayer of our Lord, is confronted, forgiven, fed, and then sent on his mission. It will feel like being bound and taken captive, says Jesus, but the end of that road will be defined by glory They were to be apostles to the ends of the earth, crossing strange seas, [**Otro Mar**]. There were at once setting out and going home. So too us, who in our own lives, but also as the **Pueblo de Dios**, setting out into the future as into an unknown sea. **Junto a ti buscar (y buscaremos) otro mar. [*Junto a ti buscar otro mar*]**. But for us too, toward Jerusalem above, the same as our forebears, where the Tribes surround the wounded lamb, our lovely dwelling place.

In the words of John Bunyan let us close in prayer...

Since, Lord, Thou dost defend  
us with Thy Spirit,  
we know we at the end  
shall life inherit.  
Then, fancies, flee away!  
I'll fear not what men say,  
I'll labor night and day  
to be a pilgrim.

We are, of course, meeting in the shadow of an election. ...

\* \* \*

Following the address, the Convention viewed a video documenting the history and ministry of Holy Family/Sagrada Familia McKinney. The Rev. Cn. Katie Gerber, deacon and canon for youth ministry, presented about the exodus of youth from the Church; the necessity of youth involvement and discipleship within the local congregation; and her own work leading Camp All Saints and diocesan youth events. Cn. Gerber also introduced four student pages who described their experiences, takeaways, and friendships from Camp All Saints.

The Chair then recognized Ms. Jolayne LaCour to deliver the third report from the Committee on Credentials, which was adopted. There were 99 clergy delegates and 150 lay delegates representing 53 parishes registered to vote in the second half of the convention.

Convention then recessed as the diocesan annual meeting and reconvened as the annual meeting of the Episcopal Diocese of Dallas. At Mr. Buchanan's motion, Will Beecherl and David Pinson were elected to the Corporation's Board of Trustees for a five-year term ending 2029. There was a point of order clarifying the length of term.

The Convention adjourned as the Corporation's annual meeting and reconvened as the diocesan annual meeting. Mr. Buchanan moved that the rest of the Bishop's nominations to diocesan committees be approved in a single vote, which was approved.

The Chair called on Mr. Cory Floyd, Chair of the Constitution and Canons committee, who reported that the committee received one proposed canon amendment, which was withdrawn for the next annual meeting. Mr. Floyd acknowledged the work of the national Task Force on Communion Across Difference and its effect on the 81<sup>st</sup> General Convention. Mr. Floyd announced the creation of a diocesan task force for the same purpose, membership whereof is to be announced by the end of the calendar year.

The Chair called on the Rev. Paul Nesta to present the report of the Committee on Resolutions. Fr. Nesta reported that there were no resolutions to bring before Convention, so no legislative debate was conducted.

The Chair then recognized Mrs. Rebecca Wellborn, Treasurer of the Diocese, to present the 2025 proposed budget (the primary report of the Finance Committee). Mrs. Wellborn celebrated the increase in assessment revenue and decrease in congregational support expenses, noted the inclusion of a line item for the expenses related to the election of a bishop coadjutor, and mentioned the completion of the annual audit. The proposed budget was adopted:

### 2025 PROPOSED BUDGET OVERVIEW

	<u>Item</u>	<u>Change from 2023</u>
<b>Total Revenues Budgeted for 2025:</b>	\$4,237,597	Δ=+\$325,620
<b>Categorized Expenses Budgeted for 2025:</b>		
Congregational Support & Development	\$828,500	\$-111,051
Youth Ministry, including Youth Camp	\$83,500	+\$3,000
Clergy Development & Support	\$419,000	+\$7600
Church Plants: Administrative Expense	\$87,300	+\$2300
Evangelism, Formation, Renewal & Mission	\$75,600	\$-11,400
Episcopal Church Ministries	\$603,000	+\$60,000
Ecumenical & Diocesan Commitments	\$106,000	\$-7,979
Office of the Episcopate	\$214,000	+\$136,500
Diocesan Staff Expenses	\$10,000	\$-2,500
Diocesan Personnel	\$1,454,245	+\$152,072
Diocesan House Expenses	\$356,300	+\$77,346
<b>Total all Expenses Budgeted for 2023</b>	<b>\$3,866,430</b>	<b>\$-178,958</b>
Net Balance	\$152	

\* \* \*

The Chair then recognized Mr. Buchanan to present courtesy resolutions, which were approved without dissent:

### **COURTESY RESOLUTIONS**

**BE IT RESOLVED**, this 129th Annual Convention of the Diocese of Dallas, on the 9th of November in the year of our Lord 2024, does hereby grant and give thanks to God for the Christian witness and dedication of clergy members who have died since the last meeting:

The Rev. P. Larry Murphy, Jr.	January 10, 2024
The Rev. Christianne McKee	February 27, 2024
The Rev. Raleigh Denison Jr.	March 22, 2024
The Rev. Canon Courtland Moore	May 5, 2024
The Rev. John Thomas Wells, Jr.	June 10, 2024

and commend their souls to the grace and mercy of God Almighty and through Jesus Christ, our risen Lord, and be further resolved that this convention sends greetings and assurance of our gratitude and prayers to their several survivors.

**BE IT RESOLVED**, this 129th Annual Convention of the Diocese of Dallas, does hereby express its gratitude to Dr. Garwood Anderson and the Rt. Rev. Dr. Justin Holcomb for their contributions to the 2024 Convention Leadership Day.

**BE IT RESOLVED**, this 129th Annual Convention of the Diocese of Dallas, does hereby express its gratitude to the Rt. Rev. Lloyd Allen as the Guest Celebrant and Preacher at the Holy Eucharist preceding the Convention.

**BE IT RESOLVED**, this 129th Annual Convention of the Diocese of Dallas, does hereby express its gratitude to the Rt. Rev. George Wayne Smith, retired Bishop of the Episcopal Diocese of Missouri, for his ministry at Episcopal Church of the Transfiguration, Saint Thomas Episcopal Church and Episcopal Church of the Ascension.

**BE IT RESOLVED**, this 129th Annual Convention of the Diocese of Dallas, does hereby express its gratitude for the hospitality and support extended to this Convention by Parish Episcopal School and its Head of School, Dr. Matthew J. Rush, its Board of Trustees, its Staff and Students.

\* \* \*

After thanking the Rt. Rev. James Stanton for his service as a supply minister, the Chair announced that the date of the special Convention to elect a bishop coadjutor will be May 3, 2025. The date of the next regular Convention will be Saturday, November 8, 2025, at Parish Episcopal School.

As no further business was laid before the session, the Chair adjourned the Convention with an episcopal blessing.

## 2024 TELLERS' REPORT (BALLOT TALLIES)

### Tabulation of Votes for Standing Committee — Clergy (elect one)

BALLOT #1 / Report #1	Clergy	Lay	
Votes Cast	92	135	
<u>Necessary to Elect</u>	<u>47</u>	<u>68</u>	
The Rev. David Halt	24	38	
The Rev. Paul Nesta	68	97	ELECTED 1 of 1 ELECTED

### Tabulation of Votes for Standing Committee — Lay (elect one)

BALLOT #1 / Report #2	Clergy	Lay	
Votes Cast	93	143	
<u>Necessary to Elect</u>	<u>47</u>	<u>72</u>	
Connie Crist	37	63	
Tim Mack	47	58	
Lon Williams	9	22	removed NO ELECTION

### Tabulation of Votes for Executive Council — Clergy (elect two)

BALLOT #1 / Report #3	Clergy	Lay	
Votes Cast	185	260	
<u>Necessary to Elect</u>	<u>47</u>	<u>65</u>	
The Rev. Tyler Been	50	62	
The Rev. Andrew Crowson	24	40	
The Rev. Jacob Nichols	24	36	removed
The Rev. Christopher Thomas	36	54	
The Rev. Patrick Webb	51	68	ELECTED 1 of 2 ELECTED

### Tabulation of Votes for Executive Council — Lay (elect four)

BALLOT #1 / Report #4	Clergy	Lay	
Votes Cast	360	547	
<u>Necessary to Elect</u>	<u>46</u>	<u>69</u>	
David Aughinbaugh	51	84	ELECTED
Dabney Dwyer	40	74	
Susan Gelinger	41	59	
Cindy Kent	34	52	
Heather Lorch	48	85	ELECTED
Jeff Shaw	26	40	removed
Brad Smith	47	62	
Katy White	73	91	ELECTED 3 of 4 ELECTED

### Tabulation of Votes for Standing Committee — Lay (elect one)

BALLOT #2 / Report #5	Clergy	Lay	
Votes Cast	95	144	
<u>Necessary to Elect</u>	<u>48</u>	<u>73</u>	
Connie Crist	40	73	
Tim Mack	55	71	NO ELECTION

Tabulation of Votes for Executive Council — Clergy (elect two)

BALLOT #2 / Report #6	Clergy	Lay	
Votes Cast	93	145	
<u>Necessary to Elect</u>	<u>47</u>	<u>73</u>	
The Rev. Tyler Been	51	79	ELECTED
The Rev. Andrew Crowson	11	23	
The Rev. Christopher Thomas	31	43	
			2 of 2 ELECTED

Tabulation of Votes for Executive Council — Lay (elect four)

BALLOT #2 / Report #7	Clergy	Lay	
Votes Cast	93	143	
<u>Necessary to Elect</u>	<u>47</u>	<u>72</u>	
Dabney Dwyer	24	41	
Susan Gelinger	20	29	
Cindy Kent	14	19	removed
Brad Smith	35	54	
			NO ELECTION

Tabulation of Votes for Standing Committee — Lay (elect one)

BALLOT #3 / Report #8	Clergy	Lay	
Votes Cast	87	144	
<u>Necessary to Elect</u>	<u>44</u>	<u>73</u>	
Connie Crist	33	63	
Tim Mack	54	81	ELECTED
			1 of 1 ELECTED

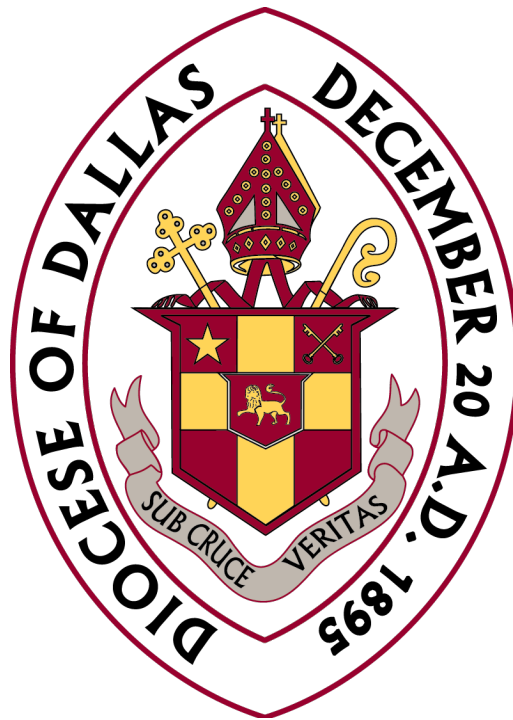
Tabulation of Votes for Executive Council — Lay (elect four)

BALLOT #3 / Report #9	Clergy	Lay	
Votes Cast	90	143	
<u>Necessary to Elect</u>	<u>46</u>	<u>72</u>	
Dabney Dwyer	25	47	
Susan Gelinger	20	29	removed
Brad Smith	45	67	
			NO ELECTION

Tabulation of Votes for Executive Council — Lay (elect four)

BALLOT #4 / Report #10	Clergy	Lay	
Votes Cast	87	135	
<u>Necessary to Elect</u>	<u>44</u>	<u>68</u>	
Dabney Dwyer	29	52	
Brad Smith	56	63	ELECTED
			4 of 4 ELECTED

REPORTS  
*TO THE*  
ONE HUNDRED  
THIRTIETH  
ANNUAL MEETING  
*OF THE*  
EPISCOPAL DIOCESE  
*OF DALLAS*



SATURDAY, NOVEMBER 8, 2025  
PARISH EPISCOPAL SCHOOL



REPORTS OF ACTIVITIES IN 2024  
PROVIDED TO  
THE ONE HUNDRED TWENTY-NINTH ANNUAL MEETING  
OF THE EPISCOPAL DIOCESE OF DALLAS  
SATURDAY, NOVEMBER 8, 2025  
PARISH EPISCOPAL SCHOOL  
DALLAS, TEXAS

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## CLERGY LIST

August 11, 2023 to August 12, 2024

### ACTIVE

The Rev. Edward R. Monk		Rector, St. John's, Corsicana	5/21/2003
The Rev. David J. Houk		Rector, St. John's, Dallas	10/15/2003
The Rev. Robert H. Johnston, III		Associate, St. Michael & All Angels, Dallas	11/15/2003
The Rev. Philip L. Snyder	(Deacon)	Deacon, St. James, Dallas	6/5/2004
The Rev. Gregory D. Pickens		Associate, St. Michael & All Angels, Dallas	5/14/2005
The Rev. Oliver M. Butler		Assisting, St. John's, Dallas	6/4/2005
The Rev. Terry R. Reisner		Rector, Epiphany, Richardson	6/4/2005
The Rev. Robert M. Corley		Rector, St. Mark's, Irving	6/24/2006
The Rev. Daniel O. Ofoegbu		Vicar, Emmanuel Anglican, Garland	8/19/2006
The Rev. Dorothy R. Budd	(Deacon)	Deacon, Incarnation, Dallas	12/2/2006
The Rev. Canon Michael R. Gilton		Rector, St. Philip's, Frisco	6/23/2007
The Rev. Timothy B. Cherry		Rector, Apostles, Coppell	8/1/2007
The Rev. Maria F. Barrios	(Deacon)	Deacon, St. Barnabas, Garland	11/10/2007
The Rev. Noe Mendez		Vicar, Santa Natividad, McKinney	11/10/2007
The Rev. Harold C. Lowe		Vicar, Holy Family, McKinney	10/2/2008
The Rev. Mary T. Lessman		Associate, St. Michael & All Angels, Dallas	6/6/2009
The Rev. Andrew D. Van Kirk		Rector, St. Andrew's, McKinney	5/2/2010
The Rev. Aquilino Lara		Vicar, San Francisco de Asis, Dallas	6/26/2010
The Rev. David D. Miller		Rector, St. Anne, DeSoto	6/26/2010
The Rev. Dr. Samira Page		Rector, Holy Nativity & Grace Community, Plano	6/26/2010
The Rev. Juana Lara	(Deacon)	Deacon, San Francisco de Asis, Dallas	6/11/2011
The Rev. Katherine A. Heitmann		Associate, St. Peter's, McKinney	7/19/2011
The Rev. J. Oliver Lee		Associate, Incarnation, Dallas	10/25/2011
The Rev. Michael S. Mills		Rector, Good Shepherd, Dallas	11/20/2011
The Rev. Fabian Villalobos		Rector, Christ Church, Dallas	4/3/2012
The Rev. Keith Turbeville		Rector, Holy Trinity-by-the-Lake, Heath	5/1/2014
The Rev. Perry E. Mullins		Rector, St. Peter's, McKinney	6/14/2014
The Rev. Rebecca G. Tankersley		Associate, Transfiguration, Dallas	6/14/2014
The Rev. Christopher A. Steele		Rector, St. Christopher's, Dallas	7/16/2014
The Rev. R. Casey Shobe		Rector, Transfiguration, Dallas	10/27/2014
The Rev. Thomas Hotchkiss		Vicar/Vice Rector, Good Shepherd, Dallas	10/28/2014
The Rev. Paul Klitzke		Rector, Ascension, Dallas	5/4/2015
The Right Rev. George R. Sumner		Seventh Bishop of Dallas	5/29/2015
The Rev. Debra S. Vela	(Deacon)	Deacon, Christ Church, Dallas	6/4/2016
The Rev. Dr. Christopher D. Girata		Rector, St. Michael & All Angels, Dallas	8/1/2016
The Rev. Thomas Smith		Rector, St. Paul's, Prosper	9/13/2016

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 Saturday, November 8, 2025

The Rev. Clayton L. Elder		Vicar/Vice Rector, St. Philip's, Frisco	6/15/2017
The Rev. Jennifer G. Smith	(Deacon)	Deacon, St. Thomas the Apostle, Dallas	11/18/2017
The Rev. Dr. Nicholas J. Funk		Rector, St. Paul's, Greenville	7/16/2018
The Rev. Paul A. Nesta		Rector, St. David of Wales, Denton	8/15/2018
The Rev. James Deng Alaak Pager		Vicar, St. Philip's Sudanese, Dallas	10/11/2018
The Rev. R. Matthew Crownover		Rector, Holy Trinity, Garland	10/27/2018
The Rev. Jonathan R. Jordan		Associate, Incarnation, Dallas	2/2/2019
The Very Rev. Robert Price		Dean, St. Matthew's Cathedral	4/10/2019
The Rev. Lorenzo Galuska		PIC, St. Stephen's, Sherman & Holy Trinity, Bonham	5/25/2019
The Rev. R. Chase Skorburg		Rector, Good Shepherd, Cedar Hill	5/25/2019
The Rev. Roy A. Thomas		Vicar, St. Andrew's, Farmers Branch	10/17/2019
The Rev. John Garang Alier	(Deacon)	Deacon, St. Philip's Sudanese, Dallas	12/4/2019
The Rev. M. Logan Hurst		Associate, St. Andrew's, McKinney	1/4/2020
The Rev. Christopher B. Thomas		Rector, St. Thomas the Apostle, Dallas	2/7/2020
The Rev. Kenneth Brannon		Vice Rector, St. Michael & All Angels, Dallas	7/1/2020
The Rev. Samuel B. Adams		Vicar, St. Augustine of Hippo, Dallas	9/14/2020
The Rev. David J.A. Halt		Rector, St. James, Texarkana	10/9/2020
The Rev. Mary Kate Gerber	(Deacon)	Missioner for Youth	4/10/2021
The Rev. Janice Honea	(Deacon)	Deacon, St. Peter's, McKinney	8/3/2021
The Rev. Julian M. Borda		Rector, St. Thomas, Ennis	10/23/2021
The Rev. Kate E. Smith		Associate, St. Paul's, Prosper	10/23/2021
The Right Rev. Fraser Lawton		Assistant Bishop & Rector, St. Dunstan's Mineola	2/4/2022
The Rev. Tyler Joe Been		Priest-in-Charge, Holy Cross, Paris	4/23/2022
The Rev. Jose Ignacio Gama		Priest-in-Charge, St. Luke's, Dallas	4/23/2022
The Rev. Christopher Stephen		Assisting, Epiphany, Richardson	4/28/2022
The Rev. Ian Geoffrey Hyde		Priest-in-Charge, Good Shepherd, Terrell	4/30/2022
The Rev. Jacob Robert Nichols		Rector, St. Luke's, Denison	4/30/2022
The Rev. Nathan John Webb		Priest-in-Charge, St. James on the Lake, Kemp	4/30/2022
The Rev. Andrew Thomas Grosso		Associate, St. Michael & All Angels, Dallas	7/5/2022
The Rev. Dr. Christopher A. Beeley		Rector, Incarnation, Dallas	7/15/2022
The Rev. Jonathan R. Melton		Rector, St. James, Dallas	11/15/2022
The Rev. Cynthia Moore		Vicar, St. Mark's Mt Pleasant & St. Philip's, Sulphur Springs	11/23/2022
The Rev. David W. Gibson	(Deacon)	Deacon, Epiphany, Richardson	12/3/2022
The Rev. Matthew J. Rossi		Curate, Incarnation, Dallas	12/3/2022
The Rev. Cody A. Turner		Curate, Incarnation, Dallas	12/3/2022
The Rev. Susana G. Williams	(Deacon)	Deacon, San Marcos, Mount Pleasant	12/17/2022
The Rev. George Joseph		Priest-in-Charge, Our Merciful Saviour, Kaufman	2/17/2023
The Rev. Patrick Webb		Priest-in-Charge, St. Nicholas, Flower Mound	5/20/2023

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The Rev. Joseph D. Dewey	Vicar/Vice Rector, Incarnation, Dallas	8/3/2023
The Rev. Louis Harris	Curate, St. John's, Dallas	10/18/2023
The Rev. Robin H. Hinkle	Associate, St. Michael & All Angels, Dallas	12/6/2023
The Rev. Carolyn Jennifer Bartkus	Rector, Annunciation, Lewisville	12/18/2023
The Rev. Andrew L. Crowson	Church Plant Intern, St. Paul's, Prosper	1/21/2024
The Rev. Leo Gan Loyola	Rector, Redeemer, Irving	2/1/2024

**RETIRED, NON-PAROCHIAL, OR OUT-OF-DIOCESE**

The Rev. G.K. Gordon Miltenberger	(Retired)	Greenville, TX	
The Rev. Arthur L. Sargent	(Retired)	San Marcos, TX	
The Rev. John W. Darden	(Retired)	Prescott Valley, AZ	
The Rev. Alice Elizabeth Ballard Springer	(Retired)	Rockwall, TX	(Deacon)
The Rev. Raleigh E. Denison, Jr.	(Retired)	Georgetown, TX	
The Rev. William J.A. Power	(Retired)	Dallas, TX	
The Rev. H. Ralph McCune	(Retired)	Dallas, TX	
The Rev. H. Edward Sholty	(Retired)	Dallas, TX	
The Rev. Jerry W. Chapman	(Retired)	Austin, TX	
The Rev. Jaime Alfredo Thomas	(Retired)	Pembroke Pines, FL	
The Rev. John Michael Klickman	(Retired)	Plano, TX	Interim, St. John the Apostle, Pottsboro
The Rev. Charles F. Keen	(Retired)	Richmond Heights, OH	
The Rev. Michael P. Metcalf	(Retired)	Plano, TX	
The Rev. Francis D. Raffalovich	(Retired)	Georgetown, TX	
The Rt Rev. Paul E. Lambert	(Retired)	Savannah, GA	Resigned, Bishop Suffragan
The Rev. Beulah H. Dailey	(Retired)	Dallas, TX	
The Rev. Barbara S. Kelton	(Retired)	Sulphur Springs, TX	Assisting, St. Peter's, McKinney
The Rev. K. Michael Harmuth	(Retired)	Dallas, TX	
The Rev. Stuart M. Kent	(Retired)	Westerly, RI	
The Rev. Donald K. Johnson	(Retired)	Denton, TX	
The Rev. Robin P. Smith	(Retired)	Plano, TX	
The Rev. Dr. Richard G. Copeland	(Retired)	San Antonio, TX	
The Rev. Stephen J. Waller	(Retired)	Dallas, TX	Assisting, St. Thomas the Apostle, Dallas
The Rev. Robert O. Ahlenius	(Retired)	Dallas, TX	
The Rev. Frederick C. Philputt, Jr.	(Retired)	Dallas, TX	
The Rt Rev. James M. Stanton	(Retired)	Richardson, TX	Resigned, Sixth Bishop of Dallas
The Rev. Sharon K. Turner	(Retired)	LaGrange, TX	
The Rev. Jon N. Hollenbeck	(Retired)	Killeen, TX	
The Rev. Damian G. Dollahite	(Retired)	Grand Prairie, TX	
The Rev. Thomas A. Pantle	(Retired)	Mineola, TX	
The Rev. Nancy E. Hood	(Retired)	Grand Prairie, TX	

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
 Saturday, November 8, 2025

The Rev. Diana N. Luck	(Retired)	Dallas, TX	
The Rev. Gail N. Gateley	(Retired)	Tigard, OR	
The Rev. Nancy T. Smalley	(Retired)	Waxahachie, TX	
The Rev. Larry P. Smith	(Retired)	Dallas, TX	
The Rev. Michael J. Malone	(Retired)	Petersburg, VA	
The Rev. Donald W. Spafford	(Retired)	Alto, NM	
The Rev. Judy A. Frizzell	(Retired)	Granbury, TX	Deacon, Incarnation, Dallas
The Rev. Craig A. Reed	(Retired)	Carrollton, TX	Interim, St. Barnabas, Denton
The Rev. Ernest W. McAfee, Jr.	(Retired)	Richardson, TX	Assisting, Ascension, Dallas
The Rev. Canon Pamela W. Dunbar	(Retired)	Dallas, TX	
The Rev. Herbert R. DeWees	(Retired)	Dallas, TX	
The Rev. Sue A. Ross	(Retired)	Richardson, TX	(Deacon)
The Rev. B. Anderson McCarthy	(Retired)	Dallas, TX	
The Very Rev. Neal O. Michell	(Retired)	Dallas, TX	
The Rev. Joy A. Daley	(Retired)	Rowlett, TX	
The Rev. Virginia F. Holleman	(Retired)	Dallas, TX	
The Rev. Betty C. Clement	(Retired)	Paris, TX	
The Rev. Alyce M. Schrimsher	(Retired)	Richardson, TX	(Deacon)
The Rev. Gary S. Herbst	(Retired)	Greenville, TX	
The Rev. Canon Jerry D. Morriss	(Retired)	Mabank, TX	
The Rev. E. Clifton Gardner	(Retired)	Richardson, TX	
The Rev. Todd H. Wetzel	(Retired)	Dallas, TX	
The Very Rev. Kevin E. Martin	(Retired)	Georgetown, TX	
The Rev. Canon Antonio Munoz	(Retired)	Garland, TX	Interim, St. Mary's, Irving
The Rev. Ariail Gores	(Retired)	Winston Salem, NC	
The Rev. Amy G. Heller	(Non-Parochial)	Addison, TX	
The Rev. William J. Cavanaugh	(Retired)	Guilford, CT	
The Rev. Canon Dr. David L. Petrash	(Retired)	Richardson, TX	Canon Pastor
The Rev. Nancy M. Powers	(Retired)	Pottsboro, TX	Assisting, St. Paul's, Prosper
The Rev. M. Ross Parker	(Non-Parochial)	Lewisville, TX	(Deacon)
The Rev. Dr. Matthew S.C. Olver	(Out of Diocese)	Wauwatosa, WI	Associate Professor, Nashotah House
The Rev. George Willcox Brown, III	(Out of Diocese)	Thomasville, GA	Assistant, All Saints, Thomasville, GA
The Rev. Peter R.R. Getz	(Retired)	Rockwall, TX	
The Rev. Donald R. Perschall	(Retired)	Denison, TX	
The Rev. Victoria R.T. Heard	(Retired)	Arlington, VA	
The Rev. H.W. Herrmann	(Retired)	Denton, TX	
The Rev. Ethel Channon	(Retired)	Mt Pleasant, TX	Assisting, St. Mark's, Mt Pleasant
The Rev. John D. Brown	(Retired)	Pittsboro, NC	

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
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The Rev. Robert S. Dannals	(Retired)	Jacksonville, FL	
The Rev. Alfredo R. Williams	(Retired)	Mt Pleasant, TX	Vicar, San Marcos, Mt Pleasant
The Rev. Elizabeth S. Breyfogle	(Retired)	McKinney, TX	Deacon, St. Peter's, McKinney
The Rev. Carol G. Hobson	(Retired)	Denton, TX	
The Rev. Diana G. Freeman	(Retired)	Terrell, TX	
The Rev. Mark R. Wright	(Retired)	Pennsylvania	
The Rev. Marcia J. Pounders	(Retired)	McKinney, TX	
The Rev. Marc A. Dobson	(Retired)	Mineola, TX	Priest-in-Charge, St. Justin Martyr, Canton
The Rt Rev. Anthony J. Burton	(Retired)	Dallas, TX	
The Rev. J. Paul Thomas	(Retired)	Duncanville, TX	
The Rev. Dr. Michael B. Cover	(Out of Diocese)	Milwaukee, WI	Associate Professor, Marquette University
The Rev. S. Thomas Kincaid	(Non-Parochial)	Dallas, TX	
The Venerable Rosemary Trei	(Retired)	Duncanville, TX	Archdeacon, St. Luke's, Dallas
The Rev. Ashley M. Classen	(Retired)	Keller, TX	
The Rev. Ronald R. Studenny	(Non-Parochial)	Kaufman, TX	
The Rev. Diana P. LaCrosse	(Retired)	Grapevine, TX	
The Rev. Matthew D. Larsen	(Out of Diocese)	Copenhagen, Denmark	Associate Professor, University of Copenhagen
The Rev. George Hoxie	(Non-Parochial)	Punta Gorda, FL	
The Rev. Paul D. Wheatley	(Out of Diocese)	Nashotah, WI	Assistant Professor, Nashotah House
The Rev. Joanna E. George	(Retired)	Frisco, TX	Deacon, St. Philip's, Frisco
The Rev. Lamuel G. Salik	(Retired)	Garland, TX	
The Rev. Mark R. Hall	(Retired)	Rockwall, TX	(Deacon)
The Rev. Canon Rene Somodevilla	(Retired)	Dallas, TX	
The Rev. C. Jeff Kraemer	(Retired)	Prosper, TX	
The Rev. Adriana J. Elliott	(Retired)	Duncanville, TX	
The Rev. Virginia M. Kivel	(Retired)	Garland, TX	Deacon, St. Christopher's, Dallas
The Rev. Canon Jordan L. Hylden	(Out of Diocese)	Lafayette, LA	Vice Rector, Ascension, Lafayette, LA
The Rev. Ryan Waller	(Non-Parochial)	Dallas, TX	
The Rev. David J. Thompson	(Out of Diocese)	Boston, MA	Vicar, Advent, Boston
The Rev. M. Randall Melton	(Retired)	Kemp, TX	
The Rev. Emily R. Hylden	(Non-Parochial)	Lafayette, LA	
The Rev. Canon Dr. Victor Lee Austin	(Retired)	Dallas, TX	Theologian-in-residence
The Rev. Joel T. Hatfield	(Non-Parochial)	Dallas, TX	
The Right Rev. Michael G. Smith	(Retired)	Buffalo, MN	Assistant Bishop
The Rev. R. Trent Pettit	(Non-Parochial)	Toronto, Canada	
The Rev. Miguel A. Carmona-Romero	(Out of Diocese)	Pittsburgh, PA	
The Rev. Audrey Sutton	(Out of Diocese)	DeLand, FL	
The Rev. Canon Christopher Brown	(Retired)		SUSPENDED

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The Rev. Teresa F. Terry	(Non-Parochial)	Dallas, TX	
The Rev. Naomi Sundara	(Out of Diocese)	Houston, TX	Chaplain, St. Martin's Preschool, Houston
The Rev. David L. Beadle	(Out of Diocese)	Durham, NC	
The Rev. Gavin E. McAdam	(Out of Diocese)	Halifax, VA	Priest-in-Charge, St. John's, Halifax, VA
The Rev. Michael P. Anderson	(Out of Diocese)	Camarillo, CA	Rector, St. Columba's, Camarillo, CA
The Rev. Daniel L. McCarley	(Out of Diocese)	Melbourne, FL	Associate, Holy Trinity, Melbourne, FL



REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
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**CLERGY RECEIVED**

The Rev. Robin H. Hinkle	Alabama	12/6/2023
The Rev. Carolyn Jennifer Bartkus	Albany	12/18/2023
The Rev. Leo Gan Loyola	Hawaii	2/1/2024

**CLERGY TRANSFERRED**

The Rev. Ryan Christopher Jordan	Central Florida	10/11/2023
The Rev. David K. Krause	Texas	11/21/2023
The Rev. Natalie Brigit Molineaux	Arkansas	12/14/2023
The Rev. Catherine Marie Thompson	Maryland	2/15/2024

**PRIESTS ORDAINED**

The Rev. Patrick Webb	Ordained By:	The Rt Rev. George R. Sumner	11/18/2023
The Rev. Louis Harris	Ordained By:	The Rt Rev. Anthony Burton	4/20/2024
The Rev. Andrew Crowson	Ordained By:	The Rt Rev George Sumner	8/17/2024

**DEACONS ORDAINED**

The Rev. Louis Harris	Ordained By:	The Rt Rev. George Sumner	10/18/2023
The Rev. Andrew Crowson	Ordained By:	The Rt Rev George Sumner	1/21/2024

**CLERGY DECEASED**

The Rev. P. Larry Murphy, Jr.	1/10/2024
The Rev. Raleigh Denison Jr.	3/22/2024

**CLERGY RESTORED**

The Rev. Natalie Brigit Molineaux	11/12/2023
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**CLERGY REMOVED**

Matthew M. Frick	8/7/2024
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<b>Number of Canonical Clergy (August 12, 2023)</b>	<b>189</b>
Received	3
Transferred	4
Ordained Priest	3
Ordained Deacon	2
Deceased	2
Restored	1
Removed	1
<b>Number of Canonical Clergy (August 11, 2024)</b>	<b>188</b>

**OFFICIAL ACTS OF THE BISHOPS  
2024**

**The Right Reverend George R. Sumner, Bishop of Dallas**

Baptism	9
Confirmation	257
Reaffirmation	7
Reception	27

**The Right Reverend Michael G. Smith, Assistant Bishop**

Baptism	0
Confirmation	32
Reaffirmation	3
Reception	3

**The Right Reverend Fraser Lawton, Assistant Bishop**

Baptism	0
Confirmation	7
Reaffirmation	2
Reception	2

**The Right Reverend James M. Stanton, Resigned**

Baptism	0
Confirmation	0
Reaffirmation	0
Reception	0

**The Right Reverend Wayne Smith, Visiting Bishop**

Baptism	0
Confirmation	1
Reaffirmation	0
Reception	0

**Totals**

Baptism	9
Confirmation	297
Reaffirmation	12
Reception	32

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
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**Annunciation, Lewisville**

Confirmation	5
Reception	1

**Christ Church, Dallas**

Confirmation	4
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**Emmanuel Anglican, Garland**

Confirmation	4
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**Good Shepherd, Terrell**

Confirmation	16
Reception	1

**Good Shepherd, Dallas**

Confirmation	6
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**Good Shepherd, Cedar Hill**

Confirmation	8
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**Grace Community, Plano**

Confirmation	10
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**Holy Cross, Paris**

Confirmation	13
Reception	2

**Holy Family, McKinney**

Confirmation	2
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**Holy Trinity, Garland**

Confirmation	5
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**Holy Trinity by the Lake, Heath**

Confirmation	12
Reception	1

**Incarnation, Dallas**

Confirmation	22
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<b>San Francisco de Asís, Dallas</b>	
Confirmation	19
<b>Saint Michael and All Angels, Dallas</b>	
Confirmation	33
Reception	1
<b>Santa Natividad, McKinney</b>	
Confirmation	3
Reception	13
<b>St. Andrew's, McKinney</b>	
Confirmation	17
Reaffirmation	1
<b>St. Andrew's, Farmers Branch</b>	
Confirmation	5
<b>St. Barnabas, Garland</b>	
Confirmation	11
<b>St. Christopher's, Dallas</b>	
Baptism	3
Confirmation	4
Reaffirmation	1
Reception	2
<b>St. David of Wales, Denton</b>	
Confirmation	9
<b>St. Dunstan's, Mineola</b>	
Confirmation	5
Reaffirmation	1
<b>St. James, Texarkana</b>	
Confirmation	11

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
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**St. James, Dallas**

Confirmation	6
Reaffirmation	2
Reception	1

**St. John's, Pottsboro**

Baptism	1
Confirmation	3

**St. John's, Dallas**

Confirmation	14
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**St. Luke's, Denison**

Confirmation	2
Reception	4

**St. Matthew's, Dallas**

Confirmation	13
Reaffirmation	1
Reception	4

**St. Nicholas, Flower Mound**

Confirmation	5
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**St. Philip's, Frisco**

Confirmation	14
Reaffirmation	5

**St. Philip's, Sulphur Springs**

Confirmation	2
Reaffirmation	1
Reception	2

**St. Philip's Sudanese, Garland**

Baptism	8
Confirmation	13

**St. Thomas, Dallas**

Reception	1
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**CORPORATION OF THE EPISCOPAL DIOCESE OF DALLAS  
2024**

**BOARD OF TRUSTEES 2024**

The Corporation of the Episcopal Diocese of Dallas holds title to real property for the benefit and use of parishes, missions, Diocesan Institutions and the Diocese. The following summarizes actions taken by the Board of Trustees during 2024:

January 16, 2024	Election of Officers for the 2024 term: The Right Reverend George R. Sumner – Chairman (ex officio) William Beecherl – President Al Nix – Vice President G. Thomas Graves, III – Treasurer Susan Lee Mills – Secretary (non-voting) Lease of Canterbury House – Authorized the leasing of Canterbury House to Church of the Incarnation along with the return of property located at 12727 Hillcrest Road with the agreement that the Corporation reimburse Incarnation for renovation costs out of any proceeds when the Hillcrest property is sold.
	Lease of St. Luke's (Dallas) – Authorized a request from St. Luke's for the leasing of office space to the Church Music Institute.
January 20, 2024	Transfiguration (Dallas) Cell Tower Lease – Authorized a request from Transfiguration to lease their cell tower to Wireless Propco.
March 22, 2024	St. Philip's (Sulphur Springs) Vicarage Sale – Authorized a request from St. Philip's to sale their former vicarage for approximately \$175,000.
April 22, 2024	Good Shepherd (Terrell) Vicarage Sale – Authorized a request from Good Shepherd to sale their former vicarage for approximately \$125,000.
May 3, 2024	St. Stephen's (Sherman) Vicarage Sale – Authorized a request from St. Stephen's to sale their former vicarage.
October 14, 2024	Wylie Remainder Property Sale – Authorized the sale of the remaining approximately 5-acre tract of property located at SWC FM 544 and Medical Plaza Drive for \$1,250,500.
December 19, 2024	Good Shepherd School (Dallas) Construction Loan – Approved a request from Good Shepherd School to enter into a commercial real estate loan transaction to finance construction of a new multi-use facility with Frost Bank in an amount not to exceed \$7,000,000.00 and to be secured by a lien on the property located at 11110 Midway Road, Dallas, Dallas County, Texas.

Submitted by: Susan Lee Mills, Missioner for Diocesan Services

**STANDING COMMITTEE  
2024**

**I. RECOMMENDATIONS MADE FOR:**

**A. Candidate for Holy Orders**

April 9, 2024

Approved to recommend Mr. Andrew Golla for Candidacy.

August 13, 2024

Approved to recommend Mr. Jordan Griesbeck for Candidacy.

September 10, 2024

Approved to recommend Mrs. Carrie Headington for Candidacy.

October 8, 2024

Approved to recommend Mrs. Erica Andersen for Candidacy.

November 12, 2024

Approved to recommend Mr. Joseph Roberts for Candidacy.

Approved to recommend Mr. Charles Mooney for Candidacy.

Approved to recommend Mr. Rick Watts for Candidacy.

**B. Ordination to the Diaconate**

August 13, 2024

Approved to recommend Mr. Jordan Griesbeck for Ordination to the Diaconate.

September 10, 2024

Approved to recommend Mrs. Carrie Headington for Ordination to the Diaconate.

October 8, 2024

Approved to recommend Mrs. Erica Andersen for Ordination to the Diaconate.

October 8, 2024

Approved to recommend Mr. Andy Golla for Ordination to the Diaconate.

**C. Ordination to the Priesthood**

March 12, 2024

Approved to recommend the Rev. Louis Harris for Ordination to the Priesthood.

May 14, 2024

Approved to recommend the Rev. Andrew Crowson for Ordination to the Priesthood.

August 20, 2024

Approved to recommend the Rev. Juana Laura for Ordination to the Priesthood.

**II. CONSENT TO RENUNCIATION OR ABANDONMENT OF THE MINISTRY**

None

**III. CONSENT TO RESTORATION OF RIGHTS AND PRIVILEGES OF THE ORDAINED MINISTRY**

None

**IV. CONSENT TO REMOVAL FROM MINISTRY**

November 12, 2024

Consented to the release and removal of Ignacio Gama from the ordained Ministry of this church and from the obligations attendant thereto.

**V. CONSENT TO ELECT (TO HOLD AN ELECTION)**

None

**VI. CONSENT TO ELECTION AND CONSECRATION**

January 16, 2024

Approved the request from the Diocese of California to consent to the election of the Rev. Austin Keith Rios as Bishop Coadjutor.

**VII. PERMISSION TO BORROW (General)**

None

**VIII. PERMISSION TO SELL**

March 12, 2024

Approved the request of St. Philip's, Sulphur Springs to sell their rectory; ratified the approval that was made via email between meetings.

April 9, 2024

Approved request from St. Stephen's, Sherman to sell a building formerly used as a rectory.

June 11, 2024

Approved the request from the Corporation to approve the sale of Trinity/Incarnation North.

**IX. GENERAL**

January 16, 2024

Approved the request to approve a new member of the Commission on Ministry, the Rev. Lillian Kamau, who would fulfill the unexpired term of an outgoing member.

Approved the request to approve the lease proposal between St. Luke's, Dallas and CMI.

February 13, 2024

Approved the request to allow the bishop to restore Holy Trinity, Garland to mission status.

Approved the lease drawn up between the Corporation and the Church of the Incarnation regarding Canterbury House/SMU.

Approved the lease between Church of the Transfiguration and the cell tower company.



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April 9, 2024

Approved the Corporation's "Memorandum of Understanding", the agreement between Church of the Incarnation, the Corporation, and the Diocese of Dallas. The document defined the return of ownership of the property back to the Corporation, the removal of liturgical and other items to Incarnation, and the financial agreement, specifically the reimbursement of certain capital investments in the event the property is sold.

April 18, 2024

Elected the Rev. Clayton Elder as chair of the Bishop Coadjutor Search Committee.

May 14, 2024

Approved that the Rt. Rev. George Sumner may take the remaining two weeks of his 2023 sabbatical in September.

August 13, 2024

Approved the coadjutor package prepared by Rebecca Wellborn, Treasurer, and the proposed job description prepared by the Rev. Clayton Elder, Standing Committee President.

Approved requests from the chair of the Commission on Ministry to fill two unexpired terms: the Rev. Bob Corley, St. Mark's Irving, filling the unexpired term of the Very Rev. Neal Michell, term ending November 2025 and Mr. Brice Beard, Incarnation, filling the unexpired term of Mr. Charles Tompkins, term ending November 2024.

August 20, 2024

Approved use of the canonical path to ordination to the priesthood with dispensation under TEC III.5.3

October 8, 2024

Approved the proposal to hold the election convention in 2025 at Saint Michael and All Angels Church in Dallas.

Approved the request from the chair of the Commission on Ministry to approve a new member, the Rev. Dr. Elizabeth Papazoglakis, who will serve out the unexpired term of Mtr. Audrey Sutton whose term would have ended with the November 2024 annual convention.

November 12, 2024

Approved to accept the Walkabout plan for the election process for Coadjutor.

Submitted by: Amy Maceo, Committee Clerk

**EXECUTIVE COUNCIL  
2024**

The Executive Council of the Episcopal Diocese of Dallas administers the Missionary, Social Service and Christian Education work of the Diocese and is charged with the fiduciary responsibility of budget and finances of the Diocese. It also discharges such order duties as may be entrusted to it by the Convention.

**January 16, 2024 (via Zoom)**

The minutes of the December 12<sup>th</sup> meeting of the Council were presented. Mr. Hal Richards moved the minutes be approved as submitted. The Revd David Beadle seconded. Motion carried.

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Ms. Rebecca Wellborn reviewed the 2023 Year-end financial reports. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

**February 13, 2024 (Diocesan Center)**

The minutes of the January 16<sup>th</sup> meeting of the Council were presented. Ms. Beth Hanks moved the minutes be approved as submitted. Mr. Britton Williams seconded. Motion carried.

Ms. Rebecca Wellborn reviewed the January 2024 financial reports. Ms. Hanks moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

Ms. Wellborn presented a budget realignment for the current fiscal year (2024). Ms. Hanks moved the budget realignment be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

Ms. Sarah Shafer moved that Christopher A. Brown be removed as signatory on all accounts held by the Episcopal Diocese of Dallas at Bank of Texas, Pegasus Bank, & American National Bank. No second was required as the resolution had previously been approved by the Finance Committee. Motion carried.

**March 2024**

No meeting was held.

**April 9, 2024 (Diocesan Center)**

The minutes of the February 13<sup>th</sup> meeting of the Council were presented. Ms. Beth Hanks moved the minutes be approved as submitted. The Rev. Tom Hotchkiss seconded. Motion carried.

Ms. Rebecca Wellborn reviewed the February & March 2024 financial reports. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

**April 30, 2024 – Special Meeting (Diocesan Center)**

A special informational meeting to discuss the process of electing of a Bishop Coadjutor was held. No business was transacted.

**May 7, 2024 – Special Meeting (Diocesan Center)**

The Revd David Beadle moved that there be no requirement to elect a specific number of Executive Council members to the Bishop Coadjutor Search Committee. Mr. Fred Ellis seconded. Motion carried. The Revd Sam Adams moved that an election require a majority vote (over 50%). Mr. Ellis seconded. Motion carried. Balloting was done electronically via smart phone. Ms. Kimberly Durnan Davis managed the voting process.

The following clergy were elected:

The Revd Sam Adams (St. Augustine, Dallas) The Revd Ian Hyde (Good Shepherd, Terrell)

The Revd Noe Mendez (Santa Natividad, McKinney) The Revd Cynthia Moore (APNET)

The Revd Samira Page (Holy Nativity, Plano) The Revd Kate Smith (St. Paul's, Prosper)

The following lay persons were elected:

Ms. Adele Ichilian (St. Matthew's Cathedral) Mr. Matt Lewis (Incarnation, Dallas)

Ms. Stevi McCoy (St. Philip's, Frisco)

Ms. Wendy Skorburg (Good Shepherd, Cedar Hill) Ms. Lee Spence (St. Dunstan's, Mineola)

Mr. Lance Taylor (St. Philip's, Frisco)

**May 14, 2024 (Diocesan Center)**

The minutes of the April 9<sup>th</sup> meeting of the Council were presented. Mr. Britton Williams moved the minutes be approved as submitted. The Revd Logan Hurst seconded. Motion carried. Ms. Rebecca Wellborn reviewed the April

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2024 financial reports. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

**June 11, 2024 (Diocesan Center)**

The minutes of the April 30<sup>th</sup> special meeting, the May 7<sup>th</sup> special meeting, & the May 14<sup>th</sup> regular meeting of the Council were presented. Mr. Britton Williams moved all minutes be approved as submitted. The Revd Logan Hurst seconded. Motion carried.

Ms. Rebecca Wellborn reviewed the May 2024 financial reports. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

**July 2024**

No meeting was held.

**August 13, 2024 (Diocesan Center)**

The minutes of the June 11<sup>th</sup> regular meeting of the Council were presented. Ms. Beth Hanks moved the minutes be approved as submitted. The Revd Sam Adams seconded. Motion carried. Ms. Rebecca Wellborn reviewed the June & July 2024 financial reports. Discussion followed. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried. (Attached.)

Ms. Wellborn presented the 2025 Preliminary Budget. Mr. Ellis moved the budget be accepted as presented. No second as required as the budget had previously been accepted by the Finance Committee. (Attached.)

Mr. Ellis moved that the 2024 budget be revised to include \$10,000 for the Bishop Coadjutor expenses that are expected for the remainder of 2024. Mr. Hal Richards seconded. Motion carried.

**September 10, 2024 (Diocesan Center)**

Ms. Rebecca Wellborn reviewed the August 2024 financial reports. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

Ms. Susan Mills, Missioner for Diocesan Services & Clerk of the Executive Council, announced that the election to fill the unexpired 2025 clergy seat would be held electronically. An election requires a majority of votes cast. The candidate receiving the least number of votes will be dropped from each subsequent ballot. Candidate bios were distributed to Council members prior to the meeting. The candidates are: The Rev. Carolyn Bartkus (Rector, Annunciation, Lewisville), The Rev. David Halt (Rector, St. James, Texarkana), The Rev. Christopher Stephen (Associate, Epiphany, Richardson), & The Rev. Rebecca Tankersley (Associate, Transfiguration, Dallas). The Rev. Rebecca Tankersley was elected on the third ballot. Council members were notified of the election results via email on Friday, September 13.

**October 8, 2024 (Diocesan Center)**

The minutes for the August 13<sup>th</sup> & September 10<sup>th</sup> meetings were presented. The Revd Tom Hotchkiss moved that both minutes be approved as presented. Father Hurst seconded. Motion carried. Ms. Rebecca Wellborn reviewed the September 2024 financial reports. Mr. Fred Ellis moved the reports be accepted as presented. No second was required as the reports had previously been accepted by the Finance Committee. Motion carried.

**November 9, 2024**

The One Hundred Twenty-ninth Annual Meeting was held at the Parish Episcopal School.

**December 10, 2024 (Diocesan Center)**

The minutes for the October 8<sup>th</sup> meeting were presented. The Revd Tom Hotchkiss moved that the minutes be approved as presented. Ms. Beth Hanks seconded. Motion carried.

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Ms. Rebecca Wellborn reviewed the October & November 2024 financial reports. Ms. Hanks moved the reports be accepted as presented & that reserve funds from Operating be applied to Youth Ministries & Congregational Support Expenses and reserve funds from Clergy Development to Curacy & Vocations Expenses be applied to cover the budget shortfall & allow for a net gain to cover the anticipated write-off of several assessment accounts. No second was required as the reports & reserve fund applications had previously been accepted by the Finance Committee. Motion carried.

Submitted by: Susan Lee Mills, missionary for diocesan services

## **REPORTS OF ORGANIZATIONS AND COMMISSIONS**

### **CANON PASTOR ACTIVITIES 2024**

Part of my function is to serve as a “Pastor on call” for Bishop Sumner. I sometimes visit with clergy who are in transition, and sometimes talk to prospective clergy about what it’s like to be a priest or deacon in the Episcopal Church. I also visit retired clergy and their families, especially when they are sick or otherwise challenged. I have helped clergy access the Episcopal Church Fund for Special Assistance. Training on the province and national levels is provided by the Episcopal Church, and I participate faithfully.

An important aspect of my ministry is to be mindful of both active and retired clergy and their families who are in the hospital or who have had deaths in their families. I do make a lot of hospital visits! Occasionally I get requests from clergy outside the Diocese of Dallas to visit loved ones who are in a Dallas hospital. I also attend clergy chaplain gatherings hosted by the major hospitals in Dallas.

It is important for active and retired clergy to feel connected with the Diocese, and I visit as much as possible in rural areas of our diocese. I hosted a luncheon for retired clergy at the Cathedral. In August I was a presenter at the Seminar on Aging at St. Dunstan’s, Mineola. I also try to remember birthdays of clergy. Several are now in their 90’s, and one is 102!

I seek to be available to help clergy and their families whenever they need someone to provide a helping hand, or maybe just someone who can listen and pray in confidence.

Submitted by: the Rev. Dr. Canon David Petrash

### **CHURCH PLANTING COMMISSION 2024**

#### Celina Church Plant Update

This past year has seen a flurry of activity as the diocese has continued to take needed steps to plant a church in the far north suburb of Celina. This past year:

- The Rev. Andrew Crowson and his family relocated to Celina, established roots in their community and worked towards making relationships with their immediate neighbors.
- Weekly coffee hours Father Drew spent downtown resulted in relationships with several regulars and have made him a fixture in the life of the town.
- The Corporation went under contract on 10 acres in Celina with the hopes of this being the location of the future church.
- The services of Bob Logan, a church planting coach, were retained for the full year for Drew+ and the monthly meetings resulted in clarity of vision, and continued momentum.
- The first interest meetings for “Advent Church Celina” were held, with over 30 individuals expressing interest in joining the new church.
- The services of a church marketing firm will be retained for the fall, as Advent looks to launch its first gatherings.

**CLERGY CONFERENCE AND CONTINUING EDUCATION  
2024**

We continue to have an annual rhythm of a leadership day connected to Convention and a three-day Clergy Conference in the winter/spring. The former has a more practical homiletical and latter a more theological one. In November 2024, the leadership day had Professor Garwood Anderson, of Nashotah House Theological Seminary, speak on the the lections from the Gospel of Luke and Bishop Justin Holcomb, Diocese of Central Florida, speak on leadership. In 2025, we invited seminary heads, Lauren Whitnah of Nashotah House Theological Seminary and Kristen Johnson of Wycliffe College.

At Clergy Conference in February 2024, Professor Brian Brock, of the University of Aberdeen, on theology, technology, and disability. The Rev. Kristine Blaess, Diocese of Tennessee, preached. We look forward to the lectures of Jordan Hylden in 2026.

Continuing Education in the Diocese of Dallas includes curate camp, lectures, and book studies with the Rev. Cn. Dr. Victor Lee Austin. Additionally, we record a good following of his blog series in the Diocesan newsletter and on the EDOD website.

Submitted by: Mrs. Haley Rossi

**CLERGY FAMILY COMMISSION  
2024**

The Clergy Family Commission hosted a picnic at the Dallas Arboretum on October 26<sup>th</sup> during the annual Pumpkin Festival. Clergy and families gathered for lunch together and spent time before and after wandering around the the displays and activities for children as they liked. In November the Commission hosted a luncheon at EDOD convention for clergy spouses attending. Representatives of the Mothers Union, Emmanuel Anglican Church and St. Philip's Sudanese Church - who were volunteers for the table in the exhibition hall.

Submitted by: Ms. Stephanie Hodgkins, Commission Chair

**COLLEGE OF DEACONS  
2024**

The College of Deacons is an essential ministry in the diocese, called to model servant ministry for others, to interpret to the Church the needs, concerns, and hopes of the world. Deacons are called to engage members of the church in the mission of meeting the needs, sharing the concerns and kindling the hopes of others. Deacons live into this call in a wide variety of ways.

Some deacons serve on the bishop's staff, and on diocesan councils and commissions. For example, Deacon Mark Hall serves as the Diocesan Deacon for Outreach and Social Justice. His charge is to facilitate EDOD parishes in reaching out to our brothers and sisters in Christ through the Greater Dallas Coalition, and to serve as a resource for outreach ministry generally in EDOD. Deacon Debra Vela oversees food distribution to several parishes throughout our diocese, and also engages in outreach to Kenya. Some deacons are active in Kairos ministry, some serve as hospital chaplains, and some have served as deans for summer camp at Camp All Saints. Deacon Katie Gerber serves on the Bishop's staff as Director for Camp All Saints and is in charge of Youth Programming. Deacons are participants and leaders in both domestic and world-wide mission efforts, including participation in the work of Gateway of Grace, and are also active in the Dallas community on boards and commissions. Deacons are retreat leaders and community gardeners; deacons are involved in healing ministries like Community of Hope and Stephen Ministry. In their parishes, deacons help organize outreach activities, are leaders in Christian education (Education for Ministry, Christian Formation, Bible Study), and offer pastoral care to the sick and the homebound. Deacon Paul

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Thomas is involved in Bible translating activities through actions and songs, Deacons accompany the bishops on visitations to the parishes. Deacon Andrea Elliott was priested and moved out of the diocese.

The annual deacons' meeting with the bishop was held at St. Matthew's Cathedral on Feb 3, 2024. Following a Eucharist in the Cathedral, the deacons gathered for presentation and discussion led by Bishop George Sumner on what renewal looks like for the church in a society driven by technology. After the presentation, deacons gathered with Bishop Sumner for lunch. 24 active deacons participated, including 2 transitional deacons. Following the discussion, each deacon shared about their ministry, their joys and their challenges. Archdeacon Rosemary Trei participated in the online conference of the AED Archdeacons Conference in March. Deacons gathered for a time of fellowship and lunch at Deacon Katie Gerber's home in December.

Deacons served with Bishop Sumner and Bishop Smith on over 20 visitations during 2024. We were not able to provide a deacon for all visits...deacons are busy in their own parishes, and also many unable to travel the longer distance.

As of December, we have 22 active permanent deacons (2 not canonically resident) and 3 retired deacons in the diocese. We also have 3 canonically resident deacons who no longer reside in the DFW area.

Submitted by: The Ven. Rosemary R. Trei, Archdeacon

**COMMISSION ON MINISTRY  
2024**

The Commission on Ministry (COM) fulfills the canonical requirement to advise the Bishop in the implementation of Title III of the Canons of The Episcopal Church, in the determination of the present and future needs for ministry, and in the design and oversight of the process for recruitment, discernment, formation, and assessment of persons for ministry.

The Commission conducted 9 meetings over the course of the year to examine and interview those responding to a call for Holy Orders. Those sessions included:

- hosted 14 aspirants at the annual discernment retreat,
- interviewed 8 nominees for postulancy
- interviewed 7 postulants for candidacy
- interviewed 4 candidates for Diaconate
- interviewed 3 deacons for Priest
- there were 4 candidates examined by the Board of Examining Chaplains, a sub-committee of the Commission.

The Commission is a dedicated group of 18 members plus 3 Ex-Officio members from across the diocese. I thank the members of COM for their commitment of time, their prayers and their dependence on our Lord for discernment for all ministry vocations both ordained and lay. It is with great blessing that I serve as chair to this group under the direction of our bishop.

Submitted by: Sandra B. Mebus, Commission Chair

**CONVENTION ARRANGEMENTS COMMITTEE  
2024**

The theme selected by The Rt. Rev. Dr. George R. Sumner for the 2024 Episcopal Diocese of Dallas annual Convention was:

**“Compañeros en el Camino del Señor”  
Companions in the Way of the Lord  
Luke 24:13-53**

The planning committee for the 129<sup>th</sup> Annual Convention began our work in November 2023 with a thorough debrief of the recently completed Convention. The debrief information guided our actions for this year’s planning to ensure a smooth Order of Business for the 2024 EDOD Convention.

The 2024 Convention was held at Parish Episcopal School and was coordinated by this Committee in conjunction with Parish Episcopal Head of School, Dr. Matthew J. Rush and his staff. We are thankful to them for the use of their beautiful campus and the extraordinary service provided by their team. Convention planning consisted of monthly committee meetings, Parish Episcopal site visits, and multiple vendor meetings. The preparation for the 2024 Convention was observed by Monica and Michael Huggins who will lead the 2025 Convention Arrangements Committee as Co-Chairs. On Friday, November 8<sup>th</sup> the Diocesan Leadership Day was held at St. Matthew’s Cathedral and the Convention set up began for the Saturday event. Preparation was completed with the assistance of TLC Event Rentals, Ikeen Music LLC Audio/Visual Services, My Secret Garden Flowers, Saint Michael and All Angels Altar Guild, the Diocesan staff, and volunteers. A Eucharist rehearsal also took place on Friday.

Convention Saturday began with a Eucharist service in the Parish School Chapel, orchestrated by The Rev. Robert M. Corley, Worship Chair. The Convention was then called to order by The Rt. Rev. Dr. George R. Sumner followed by the Bishop’s Welcome to the Convention and the subsequent Order of Business. The Convention voting process was facilitated with the assistance of Mr. Ron Rinaldi of Turning Technologies. Sage Dining Services provided both breakfast and lunch for all in attendance and the vendor exhibits were coordinated by Adele Ichilian.

Other members of the Convention Arrangements Committee that orchestrated a successful event were The Venerable Rosemary Trei, Archdeacon of the Diocese, Ellen Williamson, Parliamentarian, Kimberly Durnan-Davis, Cassie Roberts, Amy Maceo, Susan Lee Mills, Rebecca Roach, and Haley Rossi. Special thanks to Deacon Katie Gerber and the Diocesan youth volunteers for working as Convention pages to take care of our needs during the event.

Expenses for rental fees, A/V services, flowers, and dining totaled \$67,052.84 for the 2024 Convention.

Submitted by: Mark and Terry Demler, Committee Co-chairs

**CURACY PROGRAM  
2024**

This report concerns only the Curate Camp portion of our diocese’s curacy program. We had six meetings in 2024, at various churches in the diocese, all on Wednesdays from 10 a.m. to 2:30 p.m. We also had an overnight retreat in January.

Curate camp is for priests just out of seminary or otherwise new to ordained ministry, and runs for two years. The topics are practical matters in ministry, with some exploration of their theological underpinnings. In 2024 the topics covered were:

Christian ethics in the local congregation  
The Anglican Communion and us  
Marriage preparation and celebration  
What musicians would like clergy to know



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Sizing up a new congregation  
Time with the bishop  
Pastoral care and funerals

I am grateful to many who help with this program, and to Amy Maceo for her administrative skills.

Submitted by: The Rev. Canon Victor Lee Austin, PhD, Theologian-in-residence

**EPISCOPAL FOUNDATION OF DALLAS**  
**2024**

**Organization**

The Episcopal Foundation of Dallas (“the Foundation”) was established by the Diocesan Convention of 1950. It is organized as a Texas non-profit corporation and is qualified as a Section 501(c) (3) exempt organization. The Foundation mission is to strengthen and support faith communities by partnering wise investments with purposeful giving. It offers investment management services within the Episcopal Diocese of Dallas and supports organizations within the Diocese through its annual grant program. The Foundation is professionally managed and is governed by a Board of Trustees, all of whom are committed to good stewardship, prudent investment and faithful disbursement of the funds entrusted to it. The Bishop of the Episcopal Diocese of Dallas serves as an ex officio member of the board.

**Investment Services**

The Foundation’s investment management services are available to any parish, mission, school or other non-profit Episcopal organization in the Diocese.

EFD manages approximately \$50 million in assets of which \$35 million is held for our investment partners. All investment assets are pooled and invested according to a diversified asset allocation described in our investment policy. This structure creates an opportunity for clients to invest at reduced fees not otherwise available to smaller investors. The portfolio includes actively- and passively-managed mutual funds, diversified both as to fixed income and equity holdings with an aim of long-term growth. Members of the Investment and Finance committee have decades of experience in multiple investment institutions and are responsible for the supervision of the portfolio of the Foundation. New EFD investment partners in 2024 include: *St. James Episcopal School – Dallas*.

**Planned Giving Resources**

The Foundation offers planned giving resources to help parishes, missions, and schools create or support their endowments. Our Planned Giving Resource Guide is a step-by-step plan on how to start an endowment. We have also recently provided in-person workshops *at Parish Leadership Day*. Please contact us if you are interested in learning more – we are here to help!

**Annual Grant Program**

The Foundation’s annual grant program exists to support the Episcopal Diocese of Dallas, its churches, schools and agencies. Our particular emphasis is toward funding programs or ministries that address the problems of poverty, in the areas of homelessness, food insecurity and health insecurity. Diocesan entities may apply for other needs as well. *In 2025, the Foundation granted a total of \$548,100.* Since 2011, the Foundation has awarded over \$12 million to the Diocesan community. In addition to the annual grant program, the EFD Board created the **Trustees Award** in 2022 to increase awareness of EFD and to encourage innovation and effective collaboration of parish outreach ministries within the Diocese. The *Church of the Ascension, Dallas* was awarded the 2024 Trustees Award at the EDOD Convention. The first two recipients of this \$25,000 award were *St. James on the Lake, Kemp and San Francisco de Asis, Dallas*.

**Consider a gift or bequest to the Episcopal Fund**

The Foundation’s Episcopal Fund generates income for annual grants that benefit the entire Diocesan community. A direct contribution, memorial gift or bequest to the Episcopal Fund is a meaningful way to honor a loved one’s life or your own commitment to the Episcopal Church. Your gift will help the Episcopal July 23, 2025

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Fund to have an even greater impact. There are many ways to donate: write a check, leave a bequest, designate the Foundation as a beneficiary on life insurance or other retirement assets, make a charitable IRA rollover contribution, or name the Episcopal Foundation of Dallas as a recipient for memorial gifts. Please contact the Foundation for more information and help us grow.

**Donor Advised Funds**

The Foundation offers individuals a way to direct and manage their charitable contributions through donor-advised funds. Creating a fund with EFD allows individuals an economical way to focus on their charitable giving without the burden of paperwork or grant administration. The Foundation staff is available to assist in identifying grant opportunities within the Dioceses if needed. A new donor-advised fund is the *Jerry and Carroll Morriss Scholarship Fund*.

**Board of Trustees**

Our board of trustees is comprised of local Episcopal volunteers with expertise in finance, law, accounting, commercial and private equity, investing, philanthropy, marketing, and Christian discipleship.

Barbara McColm, Chair Church of the Transfiguration  
Elizabeth Trupiano, Vice President St. John's Episcopal Church  
Charles Mooney, Secretary St. Philips Episcopal Church, McKinney  
Mary Sonom, Treasurer Church of the Epiphany  
Jennifer Austin St. Andrew's Episcopal Church, McKinney  
Kam Bakewell Church of the Incarnation  
Pat Carrigan Church of the Incarnation  
Alan Dunlop Church of the Transfiguration  
Sue Gray St. Michaels and All Angels  
Scott Hancock St. Michaels and All Angels  
Sarah Kaminar Holy Cross, Paris  
Matt Lewis\* Church of the Incarnation  
Grady Schleier\* St. Michaels and All Angels  
Michael Schott\* St. James Episcopal Church, Dallas  
John A. Stetter Good Shepherd Episcopal Church  
Andy Welch Church of the Incarnation  
Bishop George Sumner Episcopal Diocese of Dallas  
Bishop Coadjutor Rob Price\*\* Episcopal Diocese of Dallas

\*New board member

\*\*Incoming

**Contact Us:** If you would like to find out more about the Episcopal Foundation of Dallas' investment services, donor-advised funds, planned giving resources, or grant program, please visit our website at [www.episcopalfoundationdallas.org](http://www.episcopalfoundationdallas.org), or contact Pam Fellows Jamieson, Executive Director at (214) 366-9996. The website includes the Foundation's most recent audited financial statements.

**HISPANIC MINISTRIES OF  
SANTA NATIVIDAD/SAGRADA FAMILIA, MCKINNEY  
2024**

Holy Family is a small family church congregation with current Sunday attendance varying from 20 to about 60. During 2024, Holy Family continued the process of adapting with Santa Natividad to both congregations sharing the worship and parish hall spaces in McKinney. This has resulted in Holy Family offering Holy Eucharist in English at 9 am. Santa Natividad offers a solemn high Mass at 1 pm. Santa Natividad offers a bilingual Mass at 5 pm.

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Holy Family engaged in on-site project management of asbestos remediation of the parish hall and construction of two ADA compliant restrooms in the parish hall using funds provided the Diocese. This remodeling project replaced restrooms that had been built by members of Holy Family in the 1950s well before ADA had been enacted and well before the City of McKinney enforced plumbing and electrical codes. This project represented a significant upgrade in the current code compliance of the parish hall restrooms.

Holy Family contracted for the placement of foundation piers under the restrooms. Members of Holy Family and Santa Natividad worked jointly to refinish the walls, ceilings, and floors of the parish hall. Members of Holy Family renewed the external porch of the parish hall, outfitted a parish office for Holy Family, and set up a maintenance and storage room. Members of Holy Family had two mini-split air conditioning units installed in the parish hall.

A new hot water heater was installed in the parish hall thanks to the generosity of a member of Holy Family. Holy Family updated the sanctuary candles from legacy paraffin candles to liquid candles including Advent Candles and Paschal Candle.

In 2024, Holy Family and Santa Natividad worked with a local roofing contractor to replace and/or repair the exterior roofing for the church and the parish hall and the ceiling of the parish hall. Significant repairs were made to the interior ceiling assembly of the nave and chancel.

Holy Family families participated with Santa Natividad families in a Vacation Bible School program in June 2024. Funding for Camp All Saints scholarships was provided to Deacon Gerber for the 2024 Camp Season.

Members of Holy Family collaborated with Ms. Andrea Nichols in a Holy Family and La Loma community historical project documenting the founding of Holy Family by Padre José de Jesús Vega and his wife Doña María Luisa Cardenas de Vega. This work has resulted in pop-up presentations at community celebrations in McKinney.

The ongoing work of Ms. Nichols involves presentations in community activities related to Hispanic Heritage Month and Día de los Muertos. Another project is documenting the history of the Church and of La Escuelita (aka Holy Family School) for purposes of securing an historical marker recognition.

Members of Holy Family undertook individual and small group participation in community outreach activities. Holy Family's vicar made weekly visits to inmates at Collin County Jail.

Submitted by: The Rev. Harold C. Lowe, Vicar

**HISPANIC MINISTRIES OF SAN BERNABÉ, GARLAND  
2024**

Saint Barnabas / San Bernabe in 2023 was finishing its construction of the new sanctuary and converting the old sanctuary into the new parish hall with a commercial rated kitchen. To honor all the people who have dedicated their time, money and expertise, to complete the renovation of the new parish hall will be the name Saints' Hall / 'Salón de los Santos. With the completion of the new sanctuary, we are gaining members from the neighborhood. We are working to become an active part of the neighborhood. The city of Garland has used Saints' Hall for several neighborhood meetings. We are working to let our neighbors know everyone is welcome here.

Submitted by: Dennis Garcia, Vestry member, St. Barnabas' Garland

### THEOLOGIAN IN RESIDENCE 2024

Report to 2025 convention on 2024 activities as Theologian-in-residence for the diocese

- Wrote weekly blog “Diary of a Theologian” on diocesan website
- Visited congregations and other groups, upon request, to preach, teach a class, lead a Bible study, lead a retreat, etc., on various topics
- Continued assisting congregational study of *A Post-Covid Catechesis* (written at request of the bishop)
- Meetings and correspondence with clergy on theology-related matters
  - This year, particular topics of discussion and study included AI, the meaning of bodiliness, identifying and teaching the good of marriage, and what constitutes a holy death
- Administered Curate Camp (separate report)
- Gave annual theology lecture on Oct 27
  - Topic: pilgrimage to Santiago de Compostela: How and Why
- Continued participation in professional societies

Respectfully submitted: The Rev. Canon Victor Lee Austin, Ph.D., Theologian-in-residence,

### YOUTH MINISTRIES 2024

Greetings fellow ministry partners!

I give all glory and praise to the God who called me for the work in His kingdom for and with our youth, and has faithfully guided, equipped, and nurtured me along this journey. I have had the privilege and honor of serving in this position since November 1, 2021.

At the time of my calling, Bishop Sumner outlined several expectations with the **First and top priority** being Summer Camp for 2022. My 2024 report reflects a busy year of ministry in which I have been continually led by the Holy Spirit.

1. I am overjoyed to report that **Summer Camp 2024 (#SC2024)** was a remarkable success!
  - We served just shy of 200 campers during 3 weeks of camp.
  - We were able to hire an outstanding group of young people to serve as Cabin Counselors; over half were returning staff from our 2023 season. There is so much to learn about recruiting, hiring, and developing these young adults. I am continually engaged in skill development and knowledge expansion in this area; specifically making it a priority to attend annual conferences with both ECCC (Episcopal Camp and Conference Centers) and ACA (American Camping Association.)
  - We continue developing our Counselor in Training program that began in 2022. We’ve learned a great deal about developing these young, aspiring leaders.
  - I had my first opportunity to attend the annual ECCC (Episcopal Camp and Conference Center national organization) Program Summit. Making connections with camping professionals has been a blessing providing me with fruitful connections in the “camping community” and helping me fill by “camp tool box.”
  - We continue receiving tremendous support from the diocesan level. Many clergy and lay leaders throughout the diocese volunteered their time to be spiritual leaders, music leaders, program leaders, and loving spirits who brought grace and encouragement to all at camp – campers, counselors, and your Summer Camp Director alike.
  - 2023 saw the official transition of All Saints Camp from EDOD oversight to the Texas Elks. The new name of the property is Texas Elks Camp on Texoma.

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
Saturday, November 8, 2025

- 2024 was our first season as a campsite “user group.”
  - With generous support and guidance from Texas Elks Camp on Texoma CEO, Steve Wetherly, and Texas Elks Camp on Texoma Executive Director, Sandi Creswell, we are working through transitional challenges so our EDOD All Saints Summer Camp Program can be its best.
  - With God’s grace, I continue to experience a smooth working relationship with the new camp owners and operating staff.
  - We continue working to promote the new EDOD Youth branding - *All Saints Camp and Youth*.
- In January 2024, I began what has become an annual tradition of visiting faith communities in our diocese to promote Summer Camp. In 2024, 13 communities invited me to visit and some opened their pulpits for guest preaching. I have come to thoroughly enjoy these visits and find them most fruitful in getting to know communities and building relationships around EDOD which has proven to be extremely fruitful for our summer camp program.
- 2. **HAPPENING** has made its return to the Episcopal Diocese of Dallas due to the passionate dedication and love for this program from St. Philip’s Youth Minister, Keleigh Linebrink. In 2024, HAPPENING #161 was held at Epiphany Richardson where 30+ students along with numerous adult volunteers participated.
- 3. We had a spring Confirmation Retreat at All Saints where programming was provided to 25 students.
- Again, clergy from around the diocese volunteered their time to prepare these young people for the sacrament of Confirmation.
- 4. With the dedicated and loving support of Fr Tom and Mother Kate Smith (St. Paul’s Prosper), Fr Logan Hurst (St. Andrew’s McKinney) and amazing adult volunteers from these communities, God lead **42** youth and adults on an amazing youth mission trip to Mescalero, NM where we served the Mescalero Apache people doing home repairs and making new friends. Young and not so young on this trip learned about being an “Influencer” for God’s kingdom
- 5. Mother Cynthia Moore along with many loving parishioners from APNET, hosted another glorious “*A Day with the Friends on the Ranch*” at her “endangered and protected” livestock farm in east Texas. Bishop Fraser Lawton and Mother Ethel Channon were not going to let the fun be had without them. Youth from across the diocese got to experience country life: fishing, holding and petting a wide assortment of God’s creatures, horseback riding, and a hay ride to feed the longhorn cattle. As Mother Cynthia is so faithful in leading the daily office from her farm – *Great and Small Creatures* ranch – our gathering was not exception and we enjoyed being lead in Morning, Noon, and Evening Prayer in this beautiful setting.
- This event has now developed into more of a “family” event/outing as opposed to a primarily youth event.
- 6. In December, EDOD youth were invited to an ice-skating outing at Skate the Square in downtown Frisco.
- 7. Youth ministers from around the diocese gathered monthly to network, support, and learn from one another. In December, I hosted a gathering for a Christmas lunch at my home.

My ministry is aimed at supporting all EDOD youth programming. I am available and eager to assist your youth programs with any needs. Over the past year and some, the Spirit has revealed to me that my focus should be our mid to smaller churches. It is sad for me that this report contains only details of youth programming from so long ago. 2025 has already been so fruitful and blessed. I anxiously await the opportunity to share with you the gifts from 2025 where through the work, guidance, and prompting of the Holy Spirit relationships with youth leaders and volunteers have blossomed and I have been able to support programs from a number of parishes.

*If I can do anything to support youth programming at your parish, please reach out.*

Submitted by: The Rev. Cn. Katie Gerber, Deacon, Missioner for EDoD Youth and Summer Camp Director

**THE UNIVERSITY OF THE SOUTH  
2024**

The University of the South is the only institute of higher education founded and governed by dioceses of the Episcopal Church. The bishops, clergy, and laity of twenty-seven dioceses form the core of the University's Board of Trustees fostering mutually beneficial relationships that make Sewanee a truly unique and special place  
*For more information or to view this report online, visit [episcopal.sewanee.edu](http://episcopal.sewanee.edu)*

**2023-2024 SEWANEE ALMANAC**

**College of Arts & Sciences:**

- Total enrollment in the College: 1,681
- Total aid awarded to College students from Constituent Dioceses: \$7M
- Total number of Episcopal College students from all 27 Constituent Dioceses: 1304

**School of Theology:**

- Enrollment in the seminary: 139
- 100% of seminarians who applied for financial aid received support
- Constituent Dioceses represented by current seminary student body: 11

**HOW YOUR DIOCESE SUPPORTS SEWANEE FINANCIALLY**

(Includes Sewanee Fund and capital project gifts for the fiscal year 7/1/2023 - 6/30/2024)

- Diocesan support in FY24: \$1,000
- Support from parishes in the diocese: \$2,000
- Percentage of parishes in the diocese that made a gift to Sewanee: 2%

**HOW YOUR DIOCESE ENGAGES WITH SEWANEE**

- College students from the diocesan area: 33
- Seminarians from the diocese: 0
- School of Theology alumni currently serving in the diocese: 15
- EfM groups in the diocese: 3

**YOUR TRUSTEES**

- The Rt. Rev. George R. Sumner, Bishop
- The Rt. Rev. Michael Smith, Assistant Bishop
- Harriet Cousins (2026)
- The Rev. Nick Funk (2025)
- Paul Talbot (2027)

**Staff Contacts:**

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# 2024 STATISTICS

*Vital and Financial Statistics  
from the 2024 Parochial Reports*

**VITAL STATISTICS FROM 2024 PAROCHIAL REPORTS**

Vital Statistics 2024 Parochial Reports		12/31/2023		12/31/2024		Services of				Other			
		Baptized Members	Baptized Members	Commun- icants	Baptisms	Confirmations	Holy Communion	ASA	Marriages	Burials	Services	Easter	
Athens, St. Matthias		57	7	31	0	0	76	25	0	1	43	46	
Bonham, Holy Trinity		18	3	15	0	0	51	11	0	2	7	15	
Canton, St. Justin the Martyr		35	35	35	0	0	49	25	0	1	3	35	
Cedar Hill, Good Shepherd		79	13	80	3	8	192	71	0	6	183	147	
Coppell, Apostles		359	375	337	2	0	112	92	0	4	0	212	
Corsicana, St. John's		330	0	102	0	0	82	59	0	3	48	100	
Dallas, St. Matthew's Cathedral		357	250	222	9	10	147	166	0	6	4	376	
Dallas, Christ Church		355	336	352	10	4	158	144	0	3	503	261	
Dallas, Good Shepherd		1125	495	495	6	5	159	217	2	8	3	740	
Dallas, Incarnation		5094	5182	2518	50	46	560	1005	9	24	466	2507	
Dallas, Transfiguration		1187	197	875	22	24	318	467	6	16	518	1204	
Dallas, Ascension		298	290	290	2	4	87	138	0	3	0	274	
Dallas, Our Saviour		0	0	0	0	0	0	0	0	0	0	0	
Dallas, Good Samaritan		78	0	0	0	0	0	0	0	0	0	0	
Dallas, San Francisco		452	115	320	44	20	156	365	4	7	0	678	
Dallas, St. Augustine		200	12	108	3	0	57	85	0	2	143	184	
Dallas, St. Christopher's		83	60	56	2	3	55	45	0	1	0	70	
Dallas, St. James		356	388	353	15	6	120	179	3	4	0	485	
Dallas, St. John's		485	403	353	5	15	269	176	1	10	257	428	
Dallas, St. Luke's		169	0	163	0	0	140	68	0	5	16	113	
Dallas, St. Michael & All Angels		5418	5353	5353	65	33	442	885	13	61	10	2695	
Dallas, St. Thomas the Apostle		399	389	165	1	1	138	66	1	10	11	137	
Dallas, St. Philip's Sudanese		386	0	0	0	0	0	0	0	0	0	0	
Denison, St. Luke's		219	14	89	1	3	118	47	0	4	0	120	
Denton, St. Barnabas		125	125	80	4	0	122	52	0	1	16	128	
Denton, St. David of Wales		359	376	206	8	14	415	180	0	4	286	306	
DeSoto, St. Anne		165	113	126	4	3	126	108	0	8	111	212	
Ennis, St. Thomas		65	15	70	2	0	58	41	1	2	43	64	
Farmers Branch, St. Andrew's		58	57	44	0	5	51	48	3	1	7	44	
Flower Mound, St. Nicholas		233	235	235	0	0	52	78	1	3	361	202	
Frisco, St. Philip's		1080	863	855	27	12	112	387	2	3	0	1310	
Garland, Emmanuel Anglican		80	0	0	4	4	3524	68	1	0	0	86	
Garland, Holy Trinity		108	81	87	2	1	57	62	0	2	0	90	
Garland, St. Barnabas/San Bernabé		775	2	200	16	5	117	119	1	3	0	221	



REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
 Saturday, November 8, 2025

Vital Statistics 2024 Parochial Reports	12/31/2023		12/31/2024		Services of				Other			
	Baptized Members	Baptized Members	Baptized Members	Commun- icants	Baptisms	Confirmations	Holy Communion	ASA	Marriages	Burials	Services	Easter
Greenville, St. Paul's	157	100	152	0	0	0	60	48	1	1	282	86
Heath, Holy Trinity by the Lake	309	278	278	8	14	159	124	1	5	1	275	78
Irving, Redeemer	177	155	155	0	0	106	57	0	4	0	665	120
Irving, St. Mark's	145	148	119	1	3	104	47	0	3	3	47	120
Irving, St. Mary's	318	120	104	18	0	145	112	0	7	47	120	120
Kaufman, Our Merciful Saviour	68	10	28	2	0	37	39	0	1	0	55	70
Kemp, St. James on the Lake	72	54	54	1	0	91	42	1	5	41	70	354
Lewisville, Annunciation	584	398	328	2	5	142	168	3	8	147	46	206
McKinney, Holy Family	169	204	166	5	2	0	156	138	1	4	0	597
McKinney, Santa Natividad	205	0	211	4	3	198	278	0	8	93	634	88
McKinney, St. Andrew's	480	34	456	2	17	56	25	0	1	625	73	152
McKinney, St. Peter's	680	695	690	3	14	60	76	0	4	96	40	40
Mineola, St. Dunstan's	124	137	137	1	5	0	52	22	0	0	0	0
Mt Pleasant, St. Mark's	71	70	70	2	0	108	42	0	1	0	0	96
Paris, Holy Cross	291	145	135	4	15	60	40	0	9	0	75	569
Pittsburg, St. William Laud	38	25	20	0	0	251	222	1	9	0	519	94
Plano, Grace Community	57	0	0	0	0	72	40	0	3	20	94	110
Plano, Holy Nativity	66	64	54	6	0	88	30	0	1	260	110	174
Pottsboro, St. John the Apostle	87	2	56	1	4	61	74	4	3	30	174	322
Prosper, St. Paul's	380	272	515	12	0	52	122	0	6	8	284	5
Richardson, Epiphany	742	741	522	5	3	147	155	2	3	43	322	284
Sherman, St. Stephen's	54	50	79	5	4	12	122	0	0	0	5	18,732
Sulphur Springs, St. Philip's	59	74	56	0	6	405	10,884	7,985	66	312	5,653	18,732
Terrell, Good Shepherd	105	12	78	6	16	19,144	20,143	26,996	347	405	19,144	20,143
Texarkana, St. James	444	432	327	4	10	405	19,144	20,143	347	405	19,144	20,143
Waxahachie, St. Paul	521	134	134	6	0	405	19,144	20,143	347	405	19,144	20,143
Winnboro, St. Francis	6	5	5	0	0	405	19,144	20,143	347	405	19,144	20,143
<b>Totals</b>	<b>26,996</b>	<b>20,143</b>	<b>19,144</b>	<b>405</b>	<b>347</b>	<b>10,884</b>	<b>7,985</b>	<b>66</b>	<b>312</b>	<b>5,653</b>	<b>18,732</b>	<b>18,732</b>

**FINANCIAL STATISTICS FROM 2024 PAROCHIAL REPORTS**

Financial Statistics		Pledging		Dollars		Plate &		Total		Total	
2024 Parochial Reports		Units		Pledged		Pledge		Revenues		Expenses	
Athens, St. Matthias		28	\$	127,872.00	\$	135,375.00	\$	160,375.00	\$	171,415.00	\$
Bonham, Holy Trinity		8	\$	16,060.00	\$	19,225.00	\$	19,225.00	\$	2,089.00	\$
Canton, St. Justin the Martyr		0	\$	-	\$	65,130.00	\$	76,053.00	\$	61,970.00	\$
Cedar Hill, Good Shepherd		33	\$	207,384.00	\$	410,527.00	\$	593,662.00	\$	239,776.00	\$
Coppell, Apostles		0	\$	-	\$	463,208.00	\$	551,498.00	\$	553,008.00	\$
Coricana, St. John's		26	\$	176,460.00	\$	259,480.00	\$	303,803.00	\$	310,167.00	\$
Dallas, St. Matthew's Cathedral		74	\$	514,494.00	\$	569,930.00	\$	1,416,319.00	\$	1,511,781.00	\$
Dallas, Christ Church		41	\$	133,380.00	\$	246,014.00	\$	350,593.00	\$	345,041.00	\$
Dallas, Good Shepherd		221	\$	1,505,193.00	\$	1,691,812.00	\$	2,756,870.00	\$	2,948,827.00	\$
Dallas, Incarnation		469	\$	4,510,101.00	\$	6,095,756.00	\$	7,127,368.00	\$	7,536,109.00	\$
Dallas, Transfiguration		438	\$	2,040,851.00	\$	2,074,175.00	\$	6,944,548.00	\$	7,287,325.00	\$
Dallas, Ascension		67	\$	599,160.00	\$	692,596.00	\$	756,506.00	\$	853,936.00	\$
Dallas, Our Saviour		0	\$	-	\$	-	\$	-	\$	-	\$
Dallas, Good Samaritan		0	\$	-	\$	-	\$	-	\$	-	\$
Dallas, San Francisco		50	\$	85,000.00	\$	280,000.00	\$	405,000.00	\$	359,000.00	\$
Dallas, St. Augustine		51	\$	177,540.00	\$	178,616.00	\$	187,299.00	\$	285,919.00	\$
Dallas, St. Christopher's		40	\$	76,000.00	\$	84,467.00	\$	103,096.00	\$	220,239.00	\$
Dallas, St. James		94	\$	606,700.00	\$	768,312.00	\$	849,448.00	\$	993,506.00	\$
Dallas, St. John's		149	\$	807,535.00	\$	822,264.00	\$	1,128,243.00	\$	955,910.00	\$
Dallas, St. Luke's		69	\$	292,749.00	\$	312,697.00	\$	1,054,549.00	\$	2,009,182.00	\$
Dallas, St. Michael & All Angels		1046	\$	6,887,000.00	\$	7,252,027.00	\$	23,432,106.00	\$	32,289,890.00	\$
Dallas, St. Thomas the Apostle		69	\$	327,144.00	\$	355,416.00	\$	360,011.00	\$	387,047.00	\$
Dallas, St. Philip's Sudanese		0	\$	-	\$	-	\$	-	\$	-	\$
Denison, St. Luke's		17	\$	52,944.00	\$	89,889.00	\$	273,165.00	\$	295,939.00	\$
Denton, St. Barnabas		26	\$	134,596.00	\$	175,455.00	\$	191,193.00	\$	184,909.00	\$
Denton, St. David of Wales		77	\$	315,762.00	\$	469,846.00	\$	1,199,780.00	\$	4,999,936.00	\$
DeSoto, St. Anne		69	\$	284,286.00	\$	325,250.00	\$	370,424.00	\$	369,431.00	\$
Ennis, St. Thomas		22	\$	142,459.00	\$	164,459.00	\$	267,479.00	\$	185,058.00	\$
Farmers Branch, St. Andrew's		29	\$	106,672.00	\$	128,870.00	\$	175,015.00	\$	188,420.00	\$
Flower Mound, St. Nicholas		28	\$	185,000.00	\$	415,461.00	\$	573,023.00	\$	548,023.00	\$
Frisco, St. Philip's		161	\$	1,060,182.00	\$	1,413,983.00	\$	2,403,339.00	\$	2,806,519.00	\$
Garland, Emmanuel Anglican		20	\$	26,456.00	\$	73,595.00	\$	101,707.00	\$	104,787.00	\$
Garland, Holy Trinity		28	\$	120,747.00	\$	204,124.00	\$	257,057.00	\$	202,740.00	\$

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
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Financial Statistics											
2024 Parochial Reports											
	Pledging		Dollars		Plate &		Total		Total		
	Units		Pledged		Pledge		Revenues		Expenses		
Garland, St. Bamabas/San Bernabé	0	\$	-		\$	167,560.00	\$	387,043.00	\$	394,339.00	
Greenville, St. Paul's	30	\$	149,468.00		\$	189,870.00	\$	248,879.00	\$	231,296.00	
Heath, Holy Trinity by the Lake	91	\$	553,200.00		\$	534,855.00	\$	937,872.00	\$	906,021.00	
Irving, Redeemer	47	\$	181,640.00		\$	231,179.00	\$	356,856.00	\$	376,528.00	
Irving, St. Mark's	42	\$	274,489.00		\$	315,200.00	\$	493,791.00	\$	337,869.00	
Irving, St. Mary's	22	\$	25,248.00		\$	58,419.00	\$	126,519.00	\$	92,783.00	
Kaufman, Our Merciful Saviour	10	\$	42,340.00		\$	39,295.00	\$	67,775.00	\$	92,853.00	
Kemp, St. James on the Lake	0	\$	-		\$	131,725.00	\$	240,244.00	\$	193,903.00	
Lewisville, Annunciation	88	\$	343,979.00		\$	418,847.00	\$	519,748.00	\$	611,314.00	
McKinney, Holy Family	0	\$	-		\$	32,389.00	\$	44,813.00	\$	33,620.00	
McKinney, Santa Natividad	70	\$	99,957.00		\$	99,957.00	\$	206,743.00	\$	196,588.00	
McKinney, St. Andrew's	130	\$	673,573.00		\$	867,711.00	\$	1,150,563.00	\$	1,033,418.00	
McKinney, St. Peter's	177	\$	749,549.00		\$	836,879.00	\$	1,334,952.00	\$	1,178,042.00	
Mineola, St. Dunstan's	34	\$	184,076.00		\$	252,363.00	\$	292,313.00	\$	297,715.00	
Mt Pleasant, St. Mark's	8	\$	20,557.00		\$	31,983.00	\$	52,268.00	\$	-	
Paris, Holy Cross	34	\$	152,640.00		\$	237,007.00	\$	352,266.00	\$	398,791.00	
Pittsburg, St. William Laud	20	\$	62,393.00		\$	78,176.00	\$	82,176.00	\$	78,125.00	
Plano, Grace Community	0	\$	-		\$	-	\$	-	\$	-	
Plano, Holy Nativity	0	\$	-		\$	97,288.00	\$	207,641.00	\$	207,321.00	
Pottsboro, St. John the Apostle	28	\$	144,560.00		\$	163,892.00	\$	175,648.00	\$	154,774.00	
Prosper, St. Paul's	99	\$	497,850.00		\$	513,465.00	\$	758,895.00	\$	798,098.00	
Richardson, Epiphany	158	\$	864,784.00		\$	913,156.00	\$	1,161,764.00	\$	1,242,021.00	
Sherman, St. Stephen's	40	\$	49,152.00		\$	63,094.00	\$	173,141.00	\$	205,934.00	
Sulphur Springs, St. Philip's	19	\$	58,020.00		\$	77,242.00	\$	285,383.00	\$	183,080.00	
Terrell, Good Shepherd	27	\$	165,400.00		\$	206,980.00	\$	377,838.00	\$	307,324.00	
Texarkana, St. James	77	\$	365,767.00		\$	521,577.00	\$	641,014.00	\$	629,482.00	
Waxahachie, St. Paul	34	\$	130,327.00		\$	267,705.00	\$	268,902.00	\$	302,681.00	
Winnboro, St. Francis	0	\$	-		\$	18,647.00	\$	18,647.00	\$	15,216.00	
Totals	4,735	\$	27,308,696.00		\$	33,604,420.00		\$	65,352,448.00	\$	79,707,035.00

## **2023 FINANCIALS**

DIOCESAN REVENUES

ASSESSMENT PAYMENTS ONLY

YTD December 2024

#	Assessment Balances	YTD Earned	YTD Paid
1	4-51570-10 - Pittsburg, St. William Laud	\$ 6,460	\$ 6,999
2	4-51470-10 - Irving, St. Mary's	\$ 3,653	\$ 3,653
3	4-51593-10 - Plano, Santa Natividad	\$ 7,533	\$ 7,533
4	4-51040-10 - Cedar Hill, Good Shepherd	\$ 13,827	\$ 13,827
5	4-51410-10 - Garland, St. Barnabas'	\$ 24,673	\$ 24,673
6	4-51620-10 - Sherman, St. Stephen's	\$ 26,900	\$ 26,900
7	4-51580-10 - Plano, Holy Nativity	\$ 20,503	\$ 20,503
8	4-51300-10 - Dallas, St. Augustine	\$ 21,302	\$ 21,302
9	4-51560-10 - Paris, Holy Cross	\$ 33,649	\$ 33,649
10	4-51591-10 - Prosper, St. Paul's	\$ 34,854	\$ 34,854
11	4-51500-10 - Lewisville, Annunciation	\$ 45,778	\$ 45,778
12	4-51430-10 - Greenville, St. Paul's	\$ 19,087	\$ 19,087
13	4-51260-10 - Dallas, St. Luke's	\$ 46,852	\$ 46,852
14	4-51520-10 - McKinney, St. Peter's	\$ 75,024	\$ 75,024
15	4-51395-10 - Flower Mound, St. Nicholas	\$ 54,745	\$ 54,745
16	4-51240-10 - Dallas, St. James'	\$ 66,024	\$ 66,024
17	4-51200-10 - Dallas, San Francisco De Asis	\$ 19,380	\$ 19,380
18	4-51610-10 - Heath, Holy Trinity	\$ 62,521	\$ 62,521
19	4-51140-10 - Dallas, Good Shepherd	\$ 161,743	\$ 161,743
20	4-51397-10 - Frisco, St. Philip's	\$ 219,889	\$ 219,889
21	4-51030-10 - Bonham, Holy Trinity	\$ 600	\$ 600
22	4-51035-10 - Canton, St. Justin	\$ 600	\$ 600
23	4-51170-10 - Dallas, Incarnation	\$ 740,274	\$ 740,274
24	4-51290-10 - Dallas, St. Michael	\$ 824,572	\$ 824,572
25	4-51306-10 - Dallas, St. Philip's Sudanese	\$ 2,400	\$ 2,400
26	4-51330-10 - Dallas, Transfiguration	\$ 208,126	\$ 208,126
27	4-51390-10 - Farmers Branch, St. Andrew's	\$ 9,567	\$ 9,567
28	4-51450-10 - Irving, Redeemer	\$ 28,323	\$ 28,323
29	4-51460-10 - Irving, St. Mark's	\$ 28,535	\$ 28,535
30	4-51481-10 - Kemp, St. James	\$ 12,899	\$ 12,899
31	4-51680-10 - Winnsboro, St. Francis	\$ 600	\$ 600
32	4-51600-10 - Richardson, Epiphany	\$ 101,318	\$ 101,318
33	4-51515-10 - McKinney, St. Andrews	\$ 64,950	\$ 64,950
34	4-51360-10 - Denton, St. David	\$ 53,552	\$ 53,552
35	4-51100-10 - Dallas, Ascension	\$ 73,793	\$ 73,793
36	4-51250-10 - Dallas, St. John's	\$ 73,792	\$ 73,792
37	4-51650-10 - Texarkana, St. James'	\$ 44,442	\$ 44,442
38	4-51320-10 - Dallas, St. Thomas'	\$ 30,664	\$ 30,664
39	4-51530-10 - Mineola, St. Dunstan's	\$ 20,239	\$ 20,239
40	4-51670-10 - Waxahachie, St. Paul's	\$ 36,453	\$ 36,453
41	4-51640-10 - Terrell, Good Shepherd	\$ 17,632	\$ 17,631

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
Saturday, November 8, 2025

**ASSESSMENT PAYMENTS ONLY**

**YTD December 2024**

#	Assessment Balances	YTD Earned	YTD Paid
42	4-51110-10 - Dallas, Christ Church	\$ 26,138	\$ 26,138
43	4-51350-10 - Denton, St. Barnabas'	\$ 24,574	\$ 24,574
44	4-51590-10 - Pottsboro, St. John	\$ 11,963	\$ 11,963
45	4-51010-10 - Athens, St. Matthias'	\$ 10,379	\$ 10,379
46	4-51340-10 - Denison, St. Luke's	\$ 20,152	\$ 20,152
47	4-51380-10 - Ennis, St. Thomas'	\$ 8,563	\$ 8,562
48	4-51630-10 - Sulphur Springs, St. Philip's	\$ 7,073	\$ 7,073
49	4-51115-10 - Garland, Emmanuel Anglican	\$ 8,170	\$ 8,170
50	4-51531-10 - Mt. Pleasant, St. Mark's	\$ 4,106	\$ 4,106
51	4-51210-10 - Dallas, St. Christopher	\$ 12,109	\$ 12,109
52	4-51270-10 - Dallas, St. Matthew's	\$ 71,627	\$ 71,627
53	4-51480-10 - Kaufman, Our Merciful Saviour	\$ 5,081	\$ 5,081
54	4-51370-10 - DeSoto, St. Anne's	\$ 34,059	\$ 34,047
55	4-51510-10 - McKinney, Holy Family	\$ 1,990	\$ 1,948
56	4-51080-10 - Coppell, Apostles'	\$ 53,133	\$ 52,456
57	4-51130-10 - Dallas, Good Samaritan	\$ 5,000	\$ 4,167
58	4-51576-10 - Plano, Grace Community	\$ 600	\$ 450
59	4-51400-10 - Garland, Holy Trinity	\$ 18,867	\$ 9,433
60	4-51070-10 - Corsicana, St. John's	\$ 27,068	\$ 2,631
61	4-51180-10 - Dallas, Our Saviour	\$ 600	\$ -
	rounding error		
61	<b>Total Assessment Balances</b>	<b>\$ 3,688,977</b>	<b>\$ 3,653,333</b>

**EPISCOPAL DIOCESE OF DALLAS**  
**OPERATING STATEMENT OF ACTIVITIES**  
**YTD December 2024**

Accounts	YTD				Annual Budget
	Budget	Actual	% Used	Over/Under	
<b>DIOCESAN REVENUES</b>					
Assessment Revenue	\$ 3,688,977	\$ 3,654,507	99%	\$ (34,469)	\$ 3,688,977
<b>Grants</b>					
4-00100-10 - Endowment of the Episcopate	\$ 90,000	\$ 90,000	100%	\$ -	\$ 90,000
4-10106-10 - E.D. Farmer Grant	\$ 35,000	\$ 35,000	100%	\$ -	\$ 35,000
4-10111-10 - Maxson Trust-Camp Salary	\$ 90,000	\$ 90,000	100%	\$ -	\$ 90,000
<b>Total Grants</b>	<b>\$ 215,000</b>	<b>\$ 215,000</b>	<b>100%</b>	<b>\$ -</b>	<b>\$ 215,000</b>
<b>Other Revenue</b>					
4-41100-10 - Interest Income	\$ 8,000	\$ 17,072	213%	\$ 9,072	\$ 8,000
4-42100-10 - Prior Year Asst. Revenue	\$ -	\$ (450)	0%	\$ (450)	\$ -
<b>Total Other Revenue</b>	<b>\$ 8,000</b>	<b>\$ 16,622</b>	<b>208%</b>	<b>\$ 8,622</b>	<b>\$ 8,000</b>
	<b>\$ 3,911,977</b>	<b>\$ 3,886,129</b>	<b>99%</b>	<b>\$ (25,848)</b>	<b>\$ 3,911,977</b>

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
Saturday, November 8, 2025

DIOCESAN EXPENSES

EPISCOPAL DIOCESE OF DALLAS  
OPERATING STATEMENT OF ACTIVITIES  
YTD December 2024

**FLOURISHING**

**Congregational Support & Dev**

**Financial Support**

5-65264-10 - Dallas, San Francisco del Asis	\$	80,000	\$	80,000	100%	\$	0	\$	80,000
5-65361-10 - Dallas, St. Christopher	\$	12,000	\$	12,109	101%	\$	109	\$	12,000
5-65365-10 - Bonham, Holy Trinity	\$	35,000	\$	48,223	138%	\$	13,223.03	\$	35,000
5-65380-10 - Athens, St. Matthias	\$	25,000	\$	25,000	100%	\$	(0)	\$	25,000
5-65539-10 - Canton, St. Justin	\$	10,000	\$	10,000	100%	\$	(0)	\$	10,000
5-65541-10 - Garland, St. Barnabas	\$	150,000	\$	129,167	86%	\$	(20,833)	\$	150,000
5-65542-10 - Irving, St. Mary's	\$	70,875	\$	70,875	100%	\$	-	\$	70,875
5-65547-10 - Garland, Emmanuel Anglican	\$	76,344	\$	73,540	96%	\$	(2,804)	\$	76,344
5-65551-10 - Farmers Branch, St. Andrew's	\$	30,000	\$	37,277	124%	\$	7,277	\$	30,000
5-65552-10 - Mineola, St. Dunstan's	\$	36,000	\$	36,000	100%	\$	-	\$	36,000
5-65571-10 - Mt Pleasant, San Marcos	\$	40,000	\$	40,000	100%	\$	(0)	\$	40,000
5-65572-10 - McKinney, Santa Natividad	\$	50,000	\$	180,520	361%	\$	130,520	\$	50,000
5-65575-10 - Dallas, St. Philip's Sudanese	\$	41,232	\$	41,020	99%	\$	(212)	\$	41,232
5-65577-10 - Dallas, Grace Community	\$	68,000	\$	68,000	100%	\$	0	\$	68,000
5-65582-10 - Garland, Holy Trinity	\$	5,000	\$	30,922	618%	\$	25,922	\$	5,000
5-65583-10 - Winnsboro, St. Francis	\$	5,000	\$	5,000	100%	\$	0	\$	5,000
5-65584-10 - Richardson, Epiphany	\$	25,000	\$	25,000	100%	\$	(0)	\$	25,000
5-65585-10 - Greenville, St. Paul's	\$	32,000	\$	32,000	100%	\$	0	\$	32,000
5-65586-10 - Flower Mound, St. Nicholas	\$	60,000	\$	60,000	100%	\$	-	\$	60,000
5-65588-10 - Pittsburg, St. William Laud	\$	5,000	\$	5,000	100%	\$	0	\$	5,000
5-65589-10 - Frisco, St. Philips	\$	20,000	\$	20,920	105%	\$	920	\$	20,000

**Total Financial Support**

\$ 876,451 \$ 1,030,572 118% \$ 154,121 \$ 876,451

**Resource Support**

5-65200-10 - Con Dev Administrative Expenses	\$	12,600	\$	38,265	304%	\$	25,665.35	\$	12,600
5-65220-10 - Stewardship & Development Dept	\$	5,000	\$	1,499	30%	\$	(3,501)	\$	5,000
5-65587-10 - APNET-Rugral Congr Support & Dev	\$	45,500	\$	45,500	100%	\$	0	\$	45,500

**Total Resource Support**

\$ 63,100 \$ 85,264 135% \$ 22,164 \$ 63,100

**Total Congregational Support & Dev**

\$ 939,551 \$ 1,115,837 119% \$ 176,285 \$ 939,551

**Youth Ministry**

5-65680-10 - Youth Program	\$	8,500	\$	8,115	95%	\$	(385.50)	\$	8,500
5-65685-10 - Summer Camp Program	\$	72,000	\$	75,673.71	105%	\$	3,673.71	\$	72,000

**Total Youth Ministry**

\$ 80,500 \$ 83,788 104% \$ 3,288 \$ 80,500

**Total FLOURISHING \$ 1,020,051 \$ 1,199,625 118% \$ 179,574 \$ 1,020,051**

**FOR THE FUTURE**

**Clergy Development & Support**

5-65160-10 - Vocations Expenses	\$	35,000	\$	112,520	321%	\$	77,520	\$	35,000
5-65170-10 - Curacy Training	\$	320,000	\$	359,481	112%	\$	39,481	\$	320,000
5-65171-10 - College of Deacons	\$	4,400	\$	625	14%	\$	(3,775)	\$	4,400
5-65280-10 - Clergy Conferences	\$	40,000	\$	37,293	93%	\$	(2,707)	\$	40,000
5-65750-10 - Clergy Family Commission	\$	2,000	\$	3,902	195%	\$	1,902	\$	2,000
5-65757-10 - Clergy Recruiting	\$	10,000	\$	4,849	48%	\$	(5,151)	\$	10,000

**Total Clergy Development & Support**

\$ 411,400 \$ 518,671 126% \$ 107,271 \$ 411,400.00

**Church Planting**

5-65260-10 - Church Plant Administrative Expense	\$	85,000	\$	78,476	92%	\$	(6,524)	\$	85,000
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**Total Church Planting**

\$ 85,000 \$ 78,476 92% \$ (6,524) \$ 85,000

**Evang, Chr Form, Renewal & Mis**

5-65130-10 - Diocesan Evangelism & Renewal	\$	42,000	\$	39,442	94%	\$	(2,558)	\$	42,000
5-65131-10 - Stanton Center for Min. Formation	\$	30,000	\$	25,280	84%	\$	(4,720)	\$	30,000
5-65620-10 - Christian Formation Commission	\$	5,000	\$	1,632	33%	\$	(3,368)	\$	5,000
5-65800-10 - Food Ministry	\$	5,000	\$	5,000	100%	\$	0	\$	5,000
5-68011-10 - Ecumenical Mission & Outreach	\$	5,000	\$	-	0%	\$	(5,000)	\$	5,000

**Total Evang, Chr Form, Renewal & Mis**

\$ 87,000 \$ 71,353 82% \$ (15,647) \$ 87,000

**Total FOR THE FUTURE \$ 583,400 \$ 668,500 115% \$ 85,100 \$ 583,400**

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
Saturday, November 8, 2025

ONENESS

**Episcopal Church Ministries**

5-61000-10 - Support-Budget of the GC	\$ 520,000	\$ 530,217	102%	\$ 10,217	\$ 520,000
5-61020-10 - Provincial Synod Assessment	\$ 5,000	\$ -	0%	\$ (5,000)	\$ 5,000
5-61040-10 - General Convention	\$ 12,500	\$ 21,672	173%	\$ 9,172	\$ 12,500
5-65730-10 - Episcopal Relief & Development	\$ 500	\$ -	0%	\$ (500)	\$ 500
5-65885-10 - Diocesan Institutions	\$ 5,000	\$ -	0%	\$ (5,000)	\$ 5,000
<b>Total Episcopal Church Ministries</b>	<b>\$ 543,000</b>	<b>\$ 551,889</b>	<b>102%</b>	<b>\$ 8,889</b>	<b>\$ 543,000</b>

**Ecumenical & Dio Commitments**

5-61030-10 - Un of the South Ownership Apportion	\$ 1,000.00	\$ 1,000	100%	\$ (0)	\$ 1,000
5-65100-10 - Retiree Benefits	\$ 70,979.00	\$ 61,388	86%	\$ (9,591)	\$ 70,979
5-65110-10 - Annual Diocesan Convention	\$ 42,000.00	\$ 89,199	212%	\$ 47,199	\$ 42,000
<b>Total Ecumenical &amp; Dio Commitments</b>	<b>\$ 113,979</b>	<b>\$ 151,587</b>	<b>133%</b>	<b>\$ 37,608</b>	<b>\$ 113,979</b>

**Office of the Episcopate Exp**

5-62065-10 - Episcopate Travel & Meetings	\$ 60,000	\$ 101,884	170%	\$ 41,884	\$ 60,000
5-62771-10 - Lambeth Conference	\$ 7,500	\$ 7,500	100%	\$ -	\$ 7,500
5-62773-10 - Global Bishop-in-Residence	\$ 5,000	\$ 5,561	111%	\$ 561	\$ 5,000
5-62774-10 - Episc Prof Services/Consultants	\$ 5,000	\$ -	0%	\$ (5,000)	\$ 5,000
5-65600-10 - Bishop Coadjutor Search Expense	\$ -	\$ 10,939	-	\$ 10,939	\$ -
<b>Total Office of the Episcopate Exp</b>	<b>\$ 77,500</b>	<b>\$ 125,884</b>	<b>162%</b>	<b>\$ 48,384</b>	<b>\$ 77,500</b>

**Diocesan Staff Expenses**

5-65030-10 - Staff Travel & Diocesan Meetings	\$ 7,500	\$ 8,987	120%	\$ 1,487	\$ 7,500
5-65035-10 - Dio Staff Prof Services/Consultants	\$ 5,000	\$ -	0%	\$ (5,000)	\$ 5,000
<b>Total Diocesan Staff Expenses</b>	<b>\$ 12,500</b>	<b>\$ 8,987</b>	<b>72%</b>	<b>\$ (3,513)</b>	<b>\$ 12,500</b>

**Diocesan Personnel Expenses**

**Personnel-The Episcopate**

5-62011-10 - Episcopate Compensation	\$ 285,033	\$ 280,009	98%	\$ (5,024)	\$ 285,033
5-62012-10 - Episcopate Group Health Insurance	\$ 76,056	\$ 55,524	73%	\$ (20,531)	\$ 76,056
5-62013-10 - Episcopate Pensions	\$ 69,274	\$ 34,963	50%	\$ (34,311)	\$ 69,274
<b>Total Personnel-The Episcopate</b>	<b>\$ 430,362</b>	<b>\$ 370,496</b>	<b>86%</b>	<b>\$ (59,866)</b>	<b>\$ 430,362</b>

**Personnel-Administration**

5-65050-10 - Administration Compensation	\$ 369,576	\$ 380,384	103%	\$ 10,808	\$ 369,576
5-65070-10 - Administration Health Insurance	\$ 111,133	\$ 62,179	56%	\$ (48,954)	\$ 111,133
5-65080-10 - Administration Pensions	\$ 34,458	\$ 32,533	94%	\$ (1,925)	\$ 34,458
5-65091-10 - Administration SSI (FICA)	\$ 28,273	\$ 29,036	103%	\$ 763	\$ 28,273
<b>Total Personnel-Administration</b>	<b>\$ 543,440</b>	<b>\$ 504,133</b>	<b>93%</b>	<b>\$ (39,307)</b>	<b>\$ 543,440</b>

**Personnel-Program & Ministry**

5-65761-10 - Program & Ministry Compensation	\$ 264,782.88	\$ 269,372.40	102%	\$ 4,590	\$ 264,783
5-65762-10 - Program & Ministry Health Insurance	\$ 17,989.88	\$ 14,445.89	80%	\$ (3,544)	\$ 17,990
5-65763-10 - Program & Ministry Pensions	\$ 32,015.55	\$ 21,687.52	68%	\$ (10,328)	\$ 32,016
5-65764-10 - Program & Ministry SSI (FICA)	\$ 13,583.00	\$ 14,232.56	105%	\$ 650	\$ 13,583
<b>Total Personnel-Program &amp; Ministry</b>	<b>\$ 328,371</b>	<b>\$ 319,738</b>	<b>97%</b>	<b>\$ (8,633)</b>	<b>\$ 328,371</b>

**Total Diocesan Personnel Expenses**

<b>\$ 1,302,174</b>	<b>\$ 1,194,367</b>	<b>92%</b>	<b>\$ (107,806)</b>	<b>\$ 1,302,174</b>
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**Diocesan House Expenses**

5-63020-10 - Insurance-Prop/Liab/WC	\$ 43,904	\$ 56,330	128%	\$ 12,426	\$ 43,904
5-63055-10 - Garrett Hall Usage Lease	\$ 70,050	\$ 70,475	101%	\$ 425	\$ 70,050
5-63058-10 - Dio House Prof Service/Consultants	\$ 5,000	\$ 1,718	34%	\$ (3,282)	\$ 5,000
5-63070-10 - Phone	\$ 1,000	\$ 6,361	636%	\$ 5,361	\$ 1,000
5-63090-10 - New Equipment & Maintenance	\$ 20,000	\$ 13,006	65%	\$ (6,994)	\$ 20,000
5-63100-10 - Postage	\$ 5,000	\$ 2,919	58%	\$ (2,081)	\$ 5,000
5-63110-10 - Office Supplies & Printing	\$ 10,000	\$ 13,904	139%	\$ 3,904	\$ 10,000
5-63120-10 - Annual Audit	\$ 50,000	\$ 45,203	90%	\$ (4,796)	\$ 50,000
5-63150-10 - Bank Service Charges	\$ 2,000	\$ 2,826	141%	\$ 826	\$ 2,000
5-63160-10 - Information Tech & Data Publishing	\$ 35,000	\$ 58,139	166%	\$ 23,139	\$ 35,000
5-65230-10 - Communications Department Expenses	\$ 37,000	\$ 19,748	53%	\$ (17,252)	\$ 37,000
<b>Total Diocesan House Expenses</b>	<b>\$ 278,954</b>	<b>\$ 290,630</b>	<b>104%</b>	<b>\$ 11,676</b>	<b>\$ 278,954</b>



REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
 Saturday, November 8, 2025

	Total ONENESS	\$	2,328,107	\$	2,323,345	100%	\$	(4,762)	\$	2,328,107	
		\$	3,931,558	\$	4,191,469	107%	\$	259,911	\$	3,931,558	
	Net Total	\$	(19,581)	\$	(305,340.49)	1559%	\$	(285,759)	\$	(19,581)	
Other Expenses											
	5-65599-10 - Bad Debt Expense	\$	-	\$	44,222	\$	-	\$	44,222	\$	-
	Total Other Expenses	\$	-	\$	44,222	\$	-	\$	44,222	\$	-
	Net Operating Total	\$	(19,581)	\$	(349,562)	1785%	\$	(329,981)	\$	(19,581)	
	Released Funds in Unrestricted Fund Bal applied to Net Operating Ttl	\$	-	\$	349,562	\$	-	\$	349,562	\$	-
	Net Operating Total after Application of Restricted Funds & ERC	\$	(19,581)	\$	0	\$	-	\$	19,581	\$	(19,581)

REPORTS TO THE 130<sup>TH</sup> ANNUAL MEETING – for calendar year 2024  
Saturday, November 8, 2025

EPISCOPAL DIOCESE OF DALLAS

Balance Sheet

December 2024

**Assets**

**Cash**

1-10600-10 - Petty Cash	\$	1,034	
1-11285-10 - Pegasus Bank MM	\$	709,415	
1-11288-10 - Pegasus Bank CK	\$	108,062	
1-11290-10 - American National Bank	\$	83,183	
<b>Total Cash</b>			\$ 901,693

<b>Assessment Receivable</b>			\$ 1,713
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**Other Assets**

1-23672-10 - Prepaid Expense for Upcoming Years	\$	39,997	
1-23750-10 - Diocesan Life & Dental Insurance	\$	4,254	
1-23959-10 - Diocesan Umbrella Insurance	\$	480	
<b>Total Other Assets</b>			\$ 44,730

<b>Total Assets</b>			<b>\$ 948,137</b>
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**Total Liabilities, Restricted & Unrestricted Fund Principal**

**Liabilities**

**Unearned Assessment**

2-31096-10 - Unearned Assessment Income	\$	539	
<b>Total Unearned Assessment</b>			\$ 539

**Other Accounts Payable**

2-31100-10 - Federal Withholding Tax	\$	(835)	
2-31250-10 - Dep for Events in Upcoming Year	\$	118	
<b>Total Other Accounts Payable</b>			\$ (717)

<b>Total Accounts Payable</b>			\$ (178)
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**Long Term Liabilities**

2-50001-10 - Postretirement Benefit Liabilities	\$	357,485	
<b>Total Long Term Liabilities</b>			\$ 357,485

<b>Total Liabilities</b>			<b>\$ 357,307</b>
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**Fund Principal**

**Restricted Fund Balance**

2-99101-10 - Clergy Support & Dev Reserve	\$	35,478	
2-99102-10 - Theological Development Reserve	\$	37,413	
2-99103-10 - Legal Compliance Reserve	\$	16,962	
2-99104-10 - Cong Support & Dev Reserve	\$	184,774	
2-99105-10 - New Church Plant Reserve	\$	255,762	
2-99106-10 - Lambeth Anglican Conference	\$	39,946	
2-99996-10 - Accumulated-Other Comp Net Inc	\$	12,398	
<b>Total Restricted Fund Balance</b>			\$ 582,734

**Unrestricted Fund Balance**


2-99110-10 - Operating Fund Balance	\$	8,096	
2-99999-10 - Unrestricted Fund Balance	\$	349,562	
Net Rev/(Expense)	\$	(349,562)	
<b>Total Unrestricted Fund Balance &amp; Net Rev/(Exp)</b>			\$ 8,096

<b>Total Restricted &amp; Unrestricted Fund Principal</b>			\$ 590,829
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<b>Total Liabilities, Restricted &amp; Unrestricted Fund Principal</b>			<b>\$ 948,137</b>
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# INDEPENDENT AUDITOR’S REPORT 2024



Report of Independent Auditors and  
Consolidated Financial Statements with  
Supplementary Information

**Episcopal Diocese of Dallas  
of the Protestant Episcopal Church**

December 31, 2024 and 2023

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## **Report of Independent Auditors**

The Bishop  
Executive Council  
Episcopal Diocese of Dallas of the  
Protestant Episcopal Church

### **Report on the Audit of the Financial Statements**

#### ***Opinion***

We have audited the consolidated financial statements of Episcopal Diocese of Dallas of the Protestant Episcopal Church and controlled organizations (the Diocese), which comprise the consolidated statements of financial position as of December 31, 2024 and 2023, and the related consolidated statements of activities and changes in net assets, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the accompanying consolidated financial statements present fairly, in all material respects, the financial position of the Diocese as of December 31, 2024 and 2023, and the results of their operations and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

#### ***Basis for Opinion***

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Diocese and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### ***Responsibilities of Management for the Financial Statements***

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for 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.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Diocese's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

### ***Auditor's Responsibilities for the Audit of the Financial Statements***

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with GAAS, we:

- exercise professional judgment and maintain professional skepticism throughout the audit.
- identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- obtain an understanding of internal control relevant to the audit 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 Diocese's internal control. Accordingly, no such opinion is expressed.
- evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Diocese's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

***Other Matter***

***Supplementary Information***

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The accompanying consolidating schedule of financial position by fund type and entity and the consolidating schedule of activities by fund type and entity are presented for purposes of additional analysis rather than to present the financial position, results of operations, and cash flows of the individual entities and are not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the consolidating schedule of financial position by fund type and entity and the consolidating schedule of activities by fund type and entity are fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

*Baker Tilly US, LLP*

Dallas, Texas  
October 20, 2025



## **Consolidated Financial Statements**

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**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidated Statements of Financial Position**  
**December 31, 2024 and 2023**

	<u>2024</u>	<u>2023</u>
<b>ASSETS</b>		
Cash and cash equivalents	\$ 1,468,897	\$ 1,866,112
Investments	6,265,360	6,070,052
Assessment receivable	-	80,000
Accounts receivable, inter-entity	1,713	54,360
Prepays and other assets	<u>69,731</u>	<u>5,392</u>
Total assets	<u><u>\$ 7,805,701</u></u>	<u><u>\$ 8,075,916</u></u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>LIABILITIES</b>		
Accounts payable	\$ 539	\$ 12,014
Accrued liabilities	108,390	-
Post-retirement benefit obligation	<u>352,253</u>	<u>357,485</u>
Total liabilities	<u>461,182</u>	<u>369,499</u>
<b>NET ASSETS</b>		
Without donor restrictions		
Undesignated (deficit)	(30,097)	(122,038)
Board-designated endowment fund, Endowment of the Episcopate	2,787,070	2,615,006
Designated - board reserves	<u>738,959</u>	<u>1,481,146</u>
Total without donor restrictions	<u>3,495,932</u>	<u>3,974,114</u>
With donor restrictions		
Purpose restricted	1,797,679	1,780,961
Endowment funds accumulated gains	995,005	895,439
Endowment funds restricted in perpetuity	<u>1,055,903</u>	<u>1,055,903</u>
Total with donor restrictions	<u>3,848,587</u>	<u>3,732,303</u>
Total net assets	<u>7,344,519</u>	<u>7,706,417</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u><u>\$ 7,805,701</u></u>	<u><u>\$ 8,075,916</u></u>

See accompanying notes.

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidated Statement of Activities and Changes in Net Assets**  
**Year Ended December 31, 2024**

	Without Donor Restrictions	With Donor Restrictions	Total
<b>REVENUES AND SUPPORT</b>			
Assessment revenue	\$ 3,654,057	\$ -	\$ 3,654,057
Contributions	143,941	205,672	349,613
Investment gain	420,708	208,998	629,706
Other	21,731	-	21,731
	<u>4,240,437</u>	<u>414,670</u>	<u>4,655,107</u>
Net assets released from restriction	<u>298,386</u>	<u>(298,386)</u>	<u>-</u>
Total revenues and support	<u>4,538,823</u>	<u>116,284</u>	<u>4,655,107</u>
<b>EXPENSES</b>			
Program			
Congregation support and development	1,504,104	-	1,504,104
Clergy support and development	1,240,370	-	1,240,370
Evangelism and outreach	754,907	-	754,907
Support of the Wider Episcopal Church	743,710	-	743,710
Total program expenses	<u>4,243,091</u>	<u>-</u>	<u>4,243,091</u>
Management general and administrative	<u>745,474</u>	<u>-</u>	<u>745,474</u>
Total expenses	<u>4,988,565</u>	<u>-</u>	<u>4,988,565</u>
CHANGE IN NET ASSETS, before nonoperating activities	(449,742)	116,284	(333,458)
<b>NONOPERATING ACTIVITIES</b>			
Post-retirement charges other than the Service cost component of net periodic benefit cost (Note 8)	<u>(28,440)</u>	<u>-</u>	<u>(28,440)</u>
CHANGE IN NET ASSETS	(478,182)	116,284	(361,898)
NET ASSETS, beginning of year	<u>3,974,114</u>	<u>3,732,303</u>	<u>7,706,417</u>
NET ASSETS, end of year	<u>\$ 3,495,932</u>	<u>\$ 3,848,587</u>	<u>\$ 7,344,519</u>

See accompanying notes.

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidated Statement of Activities and Changes in Net Assets**  
**Year Ended December 31, 2023**

	Without Donor Restrictions	With Donor Restrictions	Total
<b>REVENUES AND SUPPORT</b>			
Assessment revenue	\$ 3,604,014	\$ -	\$ 3,604,014
Contributions	794,147	326,551	1,120,698
Investment gain	459,913	483,863	943,776
Other	2,935	-	2,935
	<u>4,861,009</u>	<u>810,414</u>	<u>5,671,423</u>
Net assets released from restriction	<u>645,480</u>	<u>(645,480)</u>	<u>-</u>
Total revenues and support	<u>5,506,489</u>	<u>164,934</u>	<u>5,671,423</u>
<b>EXPENSES</b>			
Program			
Congregation support and development	1,797,138	-	1,797,138
Clergy support and development	1,512,962	-	1,512,962
Evangelism and outreach	659,299	-	659,299
Support of the Wider Episcopal Church	851,744	-	851,744
	<u>4,821,143</u>	<u>-</u>	<u>4,821,143</u>
Management general and administrative	<u>433,459</u>	<u>-</u>	<u>433,459</u>
Total expenses	<u>5,254,602</u>	<u>-</u>	<u>5,254,602</u>
<b>CHANGE IN NET ASSETS, before periodic benefit costs</b>	<b>251,887</b>	<b>164,934</b>	<b>416,821</b>
<b>NONOPERATING ACTIVITIES</b>			
Post-retirement charges other than the service cost component of net periodic benefit cost (Note 8)	<u>(17,239)</u>	<u>-</u>	<u>(17,239)</u>
<b>CHANGE IN NET ASSETS BEFORE DISCONTINUED OPERATIONS</b>	<b>234,648</b>	<b>164,934</b>	<b>399,582</b>
<b>LOSS FROM DISCONTINUED OPERATIONS NET OF INTERCOMPANY ELIMINATION</b>	<b>(2,568,313)</b>	<b>-</b>	<b>(2,568,313)</b>
<b>NET ASSETS, beginning of year</b>	<u><b>6,307,779</b></u>	<u><b>3,567,369</b></u>	<u><b>9,875,148</b></u>
<b>NET ASSETS, end of year</b>	<u><u><b>\$ 3,974,114</b></u></u>	<u><u><b>\$ 3,732,303</b></u></u>	<u><u><b>\$ 7,706,417</b></u></u>

See accompanying notes.

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidated Statement of Functional Expenses**  
**Year Ended December 31, 2024**

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	Program					
	Congregation Support and Development	Clergy Support and Development	Evangelism and Outreach	Support of the Wider Episcopal Church	Management General and Administrative	Total
Grants and support	\$ 1,044,713	\$ 710,752	\$ 429,670	\$ 651,086	\$ 238,856	\$ 3,075,077
Personnel	350,444	367,734	325,237	92,624	170,153	1,306,192
Operational	19,748	-	-	-	283,256	303,004
Convention and travel	89,199	161,884	-	-	8,987	260,070
Reserve	-	-	-	-	44,222	44,222
Total expenses	<u>\$ 1,504,104</u>	<u>\$ 1,240,370</u>	<u>\$ 754,907</u>	<u>\$ 743,710</u>	<u>\$ 745,474</u>	<u>\$ 4,988,565</u>

See accompanying notes.

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidated Statement of Functional Expenses**  
**Year Ended December 31, 2023**

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	Program					
	Congregation Support and Development	Clergy Support and Development	Evangelism and Outreach	Support of the Wider Episcopal Church	Management General and Administrative	Total
Grants and support	\$ 1,252,582	\$ 1,115,059	\$ 273,434	\$ 733,565	\$ 88,723	\$ 3,463,363
Personnel	431,671	321,639	385,865	118,179	87,554	1,344,908
Operational	29,589	-	-	-	247,221	276,810
Convention and travel	83,296	76,264	-	-	9,961	169,521
Total expenses	<u>\$ 1,797,138</u>	<u>\$ 1,512,962</u>	<u>\$ 659,299</u>	<u>\$ 851,744</u>	<u>\$ 433,459</u>	<u>\$ 5,254,602</u>

See accompanying notes.

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidated Statements of Cash Flows**  
**Years Ended December 31, 2024 and 2023**

	2024	2023
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	\$ (361,898)	\$ (2,168,731)
Adjustments to reconcile change in net assets to net cash from operating activities		
Depreciation expense	-	193,418
Unrealized gain on investments	(158,104)	(587,440)
Realized gain on investments	(179,453)	(83,541)
Employee net periodic post-retirement cost	13,659	12,990
Post-retirement benefit payments	(18,891)	(27,456)
All Saints Camp lease assignment	-	3,428,894
Forgiveness of loan payable	-	(1,153,100)
(Increase) decrease in		
Inventories	-	6,529
Assessments receivable	80,000	(34,866)
Accounts receivable, inter-entity	52,647	(17,881)
Prepays and other assets	(64,339)	-
Increase (decrease) in		
Accounts payable	(11,475)	(24,322)
Accrued liabilities	108,390	(14,818)
Net cash flows from operating activities		
- continuing operations	(539,464)	(2,746,118)
Net cash flows from operating activities - discontinued operations	-	2,275,794
Net cash flows from operating activities	(539,464)	(470,324)
CASH FLOWS FROM INVESTMENT ACTIVITIES		
Purchase of investments	(317,308)	(119,641)
Proceeds from sale of land	-	252,762
Proceeds from sale of investments	459,557	652,320
NET CASH PROVIDED BY INVESTMENT ACTIVITIES	142,249	785,441
NET CHANGE IN CASH AND CASH EQUIVALENTS	(397,215)	315,117
CASH AND CASH EQUIVALENTS, beginning of year	1,866,112	1,550,995
CASH AND CASH EQUIVALENTS, end of year	\$ 1,468,897	\$ 1,866,112
SUPPLEMENTAL DISCLOSURES OF CASH FLOW INFORMATION		
All Saints Camp lease assignment	\$ -	\$ 3,428,894
Forgiveness of loan payable	\$ -	\$ 1,153,100

See accompanying notes.

# **Episcopal Diocese of Dallas of the Protestant Episcopal Church**

## **Notes to Consolidated Financial Statements**

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### **Note 1 – Description of Diocese**

The Episcopal Diocese of Dallas of the Protestant Episcopal Church (the Diocese) is an unincorporated association, which complies with the Constitution and Canons of the Protestant Episcopal Church in the United States of America (ECUSA) and recognizes the authority of the General Convention of the Church. The Diocese includes a 25-county area in Northeast Texas. The Bishop of the Diocese of Dallas (the Bishop) has jurisdiction over all affiliated organizations within the Diocese, including parishes, missions, schools, and other charitable organizations and funds.

The Endowment of the Episcopate (the EOE) is a trust that was set up and segregated to own and manage investments that provide income for the compensation of the Bishop, the Bishop Coadjutor, and the Bishop Suffragan. The Constitution of the Diocese requires an endowment fund to be managed and controlled by a board of trustees nominated by the Bishop and elected by annual convention. After paying the necessary expenses incident to the management of the EOE, such portion of the EOE and the earnings thereof, as determined by the board of trustees (not to take more from the principal than 7% of its value at the beginning of the year), are applied annually toward the compensation of the Bishop of the Diocese, and of the Bishop Coadjutor, if there be one, and of the Suffragan Bishops, if there be any, or for other expenses of the Office of the Bishop or general Diocesan purposes.

The Diocese assumed management of the All Saints Camp and Conference Center (the Camp) in 2010. Consequently, under accounting principles generally accepted in the United States of America (GAAP), the financial position, activities and changes in net assets, and cash flows of the Camp are consolidated with those of the Diocese. The Camp is considered an evangelism and outreach program. During the year ended December 31, 2023, the Diocese made the decision to assign the lease of All Saints Camp to an unrelated third party and no longer manage the Camp. The Camp effectively became a discontinued operation and the Diocese recognized losses from discontinued operations of \$2,568,313.

The Corporation of the Episcopal Diocese (the Corporation) is a separate not-for-profit entity and was formed to hold title to all the real estate occupied by the various parishes and missions within the 25 county Diocese. In most cases, the Corporation holds nominal title to the property with the individual parish being the beneficial titleholder.

**Principles of consolidation** – These financial statements include the accounts of the Diocese (Operating Funds and Special Funds), consolidated with the EOE, and the Camp. These consolidated financial statements are the responsibility of the Diocese's management. These accounting policies conform to GAAP and have been consistently applied in the preparation of the consolidated financial statements.

As the Diocese, the EOE, and the Camp, collectively referred to hereafter as the Diocese, are under common control; these financial statements have been consolidated to reflect the results of all three organizations.

All significant inter-entity transactions have been eliminated in consolidation.



# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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### Note 2 – Summary of Significant Accounting Policies

**Description of net assets** – Net assets are classified based on existence or absence of donor-imposed restrictions as follows:

*Without donor restrictions* – Consists of resources of the Diocese that have not been restricted by a donor. The major sources of revenue are parish assessments and investment income.

*With donor restrictions* – Defined as the portion of net assets that have a restriction on the specific use or the occurrence of a certain future event. Net assets consisting of the initial fair value of the gifts where the donor has specified the assets donated are to be retained in an endowment, providing a permanent source of revenue for charitable purposes, are classified as with donor restrictions. The accumulation of assets (above historic gift value) in donor-restricted endowment funds is classified as with donor restrictions until appropriated for use based on the Diocese's spending policy. When the purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported as net assets released from restrictions.

**Estimates** – Management uses estimates and assumptions in preparing the consolidated financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and reported revenues and expenses. Significant estimates used in preparing these consolidated financial statements include those assumed in recording depreciation, post-retirement benefits, and the value of investments and notes receivable. It is at least reasonably possible that the significant estimates used will change within the next year.

**Functional expense allocations** – Expenses are allocated among program services and management and generally based on management's estimate of time spent on these functions by specific employees. The remaining costs are charged directly to the appropriate functional category.

### Major programs

*Congregation support and development* – Operating grants to existing congregations needing financial assistance to sustain their ministries. Financial support for ongoing efforts to plant new churches. Funding for work of the Diocesan leadership and personnel to further the vision of the Diocese.

*Clergy support and development* – Support for development of seminarians, curates, and existing clergy, including both financial and personnel resources and including theological research and development.

*Evangelism and outreach* – Funding for spreading the gospel throughout the Diocese and beyond its geographical boundaries.

*Support of the wider episcopal church* – Financial support for the Episcopal Church's General Convention as well as other ministries outside the Diocese of Dallas.

# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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**Cash and cash equivalents** – The Diocese classifies all unrestricted demand deposits, money market funds, and highly liquid debt investments with an initial maturity of three months or less as cash and cash equivalents. Cash and cash equivalents designated for investment are classified as investments.

**Receivables and deferred revenue from programs** – Receivables from programs represent amounts due from attendees of Camp programs and activities. Deferred revenue from programs represents advance payments to the Camp for programs and activities to be conducted in 2024. All deferred revenue at January 1, 2023, was recognized in 2024.

**Investments** – Investments are recorded at their estimated fair value at the date of the consolidated financial statements. Investment transactions are recorded on their trade date. Unrealized and realized gains and losses are included in the consolidated statements of activities and changes in net assets. Interest income is recognized on the accrual basis and dividends are recognized on the ex-dividend date.

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date; that is, an exit price. The exit price assumes the asset or liability is exchanged in an orderly transaction, and it is not a forced liquidation or distressed sale.

Assets and liabilities measured at fair value are classified in a hierarchy that prioritizes the inputs to valuation techniques giving the highest priority to readily available unadjusted quoted prices in active markets for identical assets (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements) when market prices are not readily available or reliable. The valuation levels are not necessarily an indication of the risk or liquidity associated with the underlying investment. The three levels of the hierarchy are described below:

**Level 1** – Inputs to the valuation methodology are unadjusted quoted prices in active markets for identical assets or liabilities that the Diocese has the ability to access. Valuation adjustments and block discounts are not applied to Level 1 instruments. Since valuations are based on quoted prices that are readily and regularly available in an active market, valuation of these products does not entail a significant degree of judgment.

**Level 2** – Inputs to the valuation methodology are based on directly or indirectly observable inputs such as quoted prices for similar assets in active markets and quoted prices in markets that are not active.

**Level 3** – Inputs to the valuation methodology are unobservable, significant to the fair value measurement, and reflect significant management judgment.

The Diocese's consolidated statements of financial position includes the following financial instruments that are required to be measured at fair value on a recurring basis:

- Investments held at the Episcopal Foundation of Dallas (the Foundation) are reported at fair value based on the fair value of the underlying assets in the funds as reported by the Foundation. The investments utilize the net asset value of the fund as a practical expedient to estimate the fair value.

## Episcopal Diocese of Dallas of the Protestant Episcopal Church

### Notes to Consolidated Financial Statements

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**Artwork and research collection** – Collection items, which have been acquired through purchases and contributions since the Diocese' inception are not recognized as assets on the consolidated statements of financial position.

**Archives and artifacts** – The Diocese maintains a collection of archives and artifacts that are not capitalized on the consolidated statements of financial position. The collection includes historical documents, photographs, and artifacts significant to the Diocese. While the items are not capitalized, the Diocese conducts periodic assessments of the collection.

**Post-retirement benefits** – The Diocese estimates its post-retirement benefit costs and obligations associated with its Medicare Supplement Plan using various actuarial assumptions and methodologies. Assumptions include the current discount rate, expected costs of the plan over time, and mortality rates. To assist in developing these assumptions and estimates, the Diocese uses the services of an independent actuary. Although the Diocese believes that the assumptions used are appropriate, differences between assumed and actual experience may affect the Diocese's operating results.

**Revenues and support** – The Executive Council of the Diocese has the authority to assess the parishes and missions for support of the budget as established by the annual Diocesan Convention. The Diocese receives a substantial portion of its revenues from assessments on parishes and missions within the Diocese. Assessments receivable at the statement of financial position date represent amounts due from various parishes and missions. No amounts are considered uncollectible as the Diocese fully expects to collect these amounts. Any excess assessments at year-end are retained by the Diocese for use in the succeeding year.

Contributions are comprised of revenue from gifts, grants, and bequests. Contributions are considered to be without donor restriction unless they are specifically restricted by the donor. Contributions designated for future periods or restricted by the donor for specific purposes or in perpetuity are reported as contributions with donor restrictions.

**Income taxes** – The Diocese and the EOE are not-for-profit organizations that are exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code.

GAAP requires management to evaluate tax positions taken by the Diocese and recognize a tax liability if the Diocese has taken an uncertain position that more likely than not would not be sustained upon examination by the U.S. federal, state, or local tax authorities.

The Diocese has analyzed their tax positions and has concluded that as of December 31, 2024 and 2023, there are no uncertain positions taken, or expected to be taken, that would require recognition of a liability or disclosure in the consolidated financial statements.

# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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**Subsequent events** – Subsequent events are events or transactions that occur after the consolidated statements of financial position date but before the consolidated financial statements are available to be issued. The Diocese recognizes in the consolidated financial statements the effects of all subsequent events that provide additional evidence about conditions that existed at the date of the consolidated statement of financial position, including the estimates inherent in the process of preparing the consolidated financial statements. The Diocese's consolidated financial statements do not recognize subsequent events that provide evidence about conditions that did not exist at the date of the consolidated statement of financial position but arose after the consolidated statement of financial position date and before the consolidated financial statements are available to be issued. The Diocese has evaluated subsequent events through October 20, 2025, which is the date the consolidated financial statements were available to be issued.

### Note 3 – Liquidity and Availability

Financial assets available for general expenditures, that is, without donor or other restrictions limiting the use, within one year of the date of the consolidated statements of financial position for the years ended December 31 are comprised of the following:

	2024	2023
Cash and cash equivalents	\$ 1,468,897	\$ 1,866,112
Investments	6,265,360	6,070,052
Assessment receivable	-	80,000
Accounts receivable, inter-entity	1,713	54,360
Other receivables	4,254	5,392
	<u>7,740,224</u>	<u>8,075,916</u>
Total financial assets		
Less financial assets unavailable for general expenditure within one year		
Purpose restricted net assets	(1,797,679)	(1,780,961)
Endowment and accumulated earnings	(995,005)	(895,439)
Endowment funds restricted in perpetuity	(1,055,903)	(1,481,146)
Board-designed endowment fund and accumulated earnings*	<u>(2,591,975)</u>	<u>(2,431,956)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 1,299,662</u>	<u>\$ 1,486,414</u>

\*Net of next year's estimated spending not to exceed seven percent of principal at the beginning of the year (see Note 1).

The Diocese policy is to structure its financial assets to be available to cover the following in order of priority: current operations, planned future operations, unanticipated expenses, sudden shortfalls in revenues, and capital assets. The Diocese reserves the right to transfer funds from the board of trustees designated reserves, as needed, as approved by the board of trustees.

In addition to financial assets available to meet general expenditures over the next 12 months, the Diocese operates with a balanced budget and anticipates assessments to cover general expenditures.

# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

### Note 4 – Investments

Investments at December 31 are as follows:

	2024	2023
Episcopal Foundation of Dallas (the Foundation)	\$ 6,265,360	\$ 6,070,052
Total	<u>\$ 6,265,360</u>	<u>\$ 6,070,052</u>

Funds invested with the Foundation are part of the Foundation's diversified portfolio of cash, fixed income securities, marketable equity securities, and alternative investments. This investment is valued based upon the Diocese's pro rata interest in the Foundation's agency investment funds (approximately 19% and 18% at December 31, 2024 and 2023, respectively). This investment seeks to preserve assets through an investment return sufficient to offset inflation and enhance, where possible, assets through an investment return sufficient to achieve payout objectives and preserve the value of the corpus. The Diocese's investment may be redeemed at any time with no prior notice. The Foundation will normally remit funds by month end following a request for redemption. In the event of a total liquidation of the Diocese's investment, the Foundation may hold back a portion of the investment related to alternate investments which may be redeemed quarterly with a 90-day notice.

The Diocese's investment returns for the years ended December 31 consist of the following:

	2024	2023
Dividends and interest	\$ 338,442	\$ 217,779
Net realized gains	179,453	83,542
Net unrealized gains	158,104	587,440
Fees	(46,293)	55,015
Total	<u>\$ 629,706</u>	<u>\$ 943,776</u>

The following table presents investments carried at fair value as of December 31, 2024 and 2023, based upon the valuation hierarchy described in Note 2.

Financial Investments Owned, December 31, 2024					
Description	Total	Level 1	Level 2	Level 3	NAV Practical Expedient
The Foundation	\$ 6,265,360	\$ -	\$ -	\$ -	\$ 6,265,360
Total	<u>\$ 6,265,360</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 6,265,360</u>
Financial Investments Owned, December 31, 2023					
Description	Total	Level 1	Level 2	Level 3	NAV Practical Expedient
The Foundation	\$ 5,931,750	\$ -	\$ -	\$ -	\$ 6,070,052
Total	<u>\$ 5,931,750</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 6,070,052</u>

## **Episcopal Diocese of Dallas of the Protestant Episcopal Church**

### **Notes to Consolidated Financial Statements**

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#### **Note 5 – Note Payable, Related Party**

On November 30, 2009, the Corporation made a \$1.3 million property loan to the Camp. The principal on this note is due and payable in annual installment payments in the amount of \$100,000. During 2023, the loan balance was forgiven, and Camp realized a gain on forgiveness of \$1,153,100.

#### **Note 6 – Employee Retirement Benefits**

The Diocese contributes to a retirement plan for clergy employed by the Diocesan office, which is maintained and administered by the Church Pension Group of the Episcopal Church (CPG). The Diocese makes annual contributions to the fund equal to 18% of compensation. Total contributions for the years ended December 31, 2024 and 2023, were approximately \$60,475 and \$82,132, respectively.

The Diocese contributes to another retirement plan for lay employees. This plan is maintained and administered by the CPG. The Diocese makes annual contributions to the fund equal to 10% of employee compensation. Total contributions for the years ended December 31, 2024 and 2023, were approximately \$45,148 and \$46,930, respectively.

The Diocese contributes to another retirement plan for employees of the Camp. This plan is maintained and administered by the CPG. The Camp makes annual contributions to the fund up to 10% of Camp employee compensation. The Diocese contributes 9% of the Camp's Executive Director's compensation and housing to another retirement plan administered by CPG. Total contributions for the years ended December 31, 2024 and 2023, were approximately \$0 and \$3,710, respectively.

The Diocese also has a post-retirement noncontributory Medicare Supplement Plan that covers laity employees who meet certain eligibility requirements. The Diocese paid approximately \$61,388 and \$54,390 for retiree Medicare Supplement premiums for the years ended December 31, 2024 and 2023, respectively.

# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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**Obligations and funded status** – A summary of fair value of plan assets, benefit obligations, and funded status of the post-retirement noncontributory Medicare Supplement Plan as of December 31:

	2024	2023
Change in benefit obligation		
Post-retirement benefit obligation, at beginning of year	\$ 357,485	\$ 371,951
Service cost	-	3,103
Interest cost	13,659	9,887
Benefits paid	(18,891)	(27,456)
	<u>\$ 352,253</u>	<u>\$ 357,485</u>
Change in plan assets		
Fair value of plan assets at beginning of year	\$ -	\$ -
Employer contributions	18,891	27,456
Benefits paid	(18,891)	(27,456)
Fair value of plan assets, at end of year	<u>-</u>	<u>-</u>
Funded status, at end of year (underfunded)	<u>\$ (352,253)</u>	<u>\$ (357,485)</u>

Items not yet recognized in net periodic benefit cost.

	2024	2023
Unrecognized prior service cost	\$ (12,398)	\$ (29,637)
Net gain	28,440	17,239
Total	<u>\$ 16,042</u>	<u>\$ (12,398)</u>

Net periodic post-retirement benefit cost, recognized in the consolidated statements of activities and changes in net assets.

	2024	2023
Service cost	\$ 28,440	\$ 3,103
Net periodic post-retirement benefit cost	<u>\$ 28,440</u>	<u>\$ 3,103</u>
Items not yet recognized in net periodic benefit cost, at beginning	\$ (12,398)	\$ (29,637)
Net loss	-	-
Prior service cost amortization	28,440	17,239
Items not yet recognized in net periodic benefit cost, at end of year	<u>\$ 16,042</u>	<u>\$ (12,398)</u>

The estimated prior service credit for the post-retirement noncontributory Medicare Supplement previously recognized as a change in unrestricted net assets but not included in net periodic benefit cost that will be amortized into net periodic benefit cost over the next year is \$28,440.

# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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**Assumptions** – The following weighted-average assumptions were used to determine discount rates at December 31:

	<u>2024</u>	<u>2023</u>
Net periodic benefit cost discount rate	4.92%	3.01%
Benefit obligations	5.23%	4.92%

Assumed health care cost trend rates have a significant effect on the amounts reported for the Medicare Supplement. For measurement purposes, a 5.7% rate of increase per year was assumed. A one percentage point change in assumed health care cost trend rates would have the following effects:

	<u>2024</u>	<u>2023</u>
1% Increase		
Effect on total of service and interest cost	\$ -	\$ 2,073
Effect on post-retirement benefit obligation	\$ 10,917	\$ 53,554
1% Decrease		
Effect on total of service and interest cost	\$ -	\$ (1,341)
Effect on post-retirement benefit obligation	\$ (9,938)	\$ (30,750)

The following minimum benefit payments are expected to be paid:

Years Ending  
December 31,

2025	\$ 24,228
2026	23,423
2027	22,105
2028	20,831
2029	19,444
2030 – 2034	<u>74,844</u>
Total	<u><u>\$ 184,875</u></u>

The Diocese's contributions for the years ended December 31, 2024 and 2023, is \$18,891 and \$27,456, respectively.



# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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### Note 7 – Net Assets with Donor Restrictions

Net assets with donor restrictions are available for the following at December 31:

	2024		
	Purpose Restricted	Endowment	Total
Educational purposes	\$ 967,526	\$ 559,633	\$ 1,527,159
Alcoholic rehabilitation	127,108	-	127,108
Scholarships	488,486	768,754	1,257,240
Missions	9,694	410,726	420,420
Children's services	300	311,795	312,095
Camp services	63,138	-	63,138
Ministry at large	141,427	-	141,427
Net assets with donor restrictions, available	<u>\$ 1,797,679</u>	<u>\$ 2,050,908</u>	<u>\$ 3,848,587</u>

	2023		
	Purpose Restricted	Endowment	Total
Educational purposes	\$ 898,168	\$ 537,134	\$ 1,435,302
Alcoholic rehabilitation	138,861	-	138,861
Scholarships	491,037	698,359	1,189,396
Missions	17,694	405,055	422,749
Children's services	300	283,244	283,544
Camp services	57,357	-	57,357
Ministry at large	177,544	27,550	205,094
Net assets with donor restrictions, available	<u>\$ 1,780,961</u>	<u>\$ 1,951,342</u>	<u>\$ 3,732,303</u>

### Note 8 – Endowment Funds

The Diocese's endowment funds consist of approximately five funds, including the EOE, established for a variety of purposes. The endowment funds include both donor-restricted endowment funds and funds designated by the Executive Council to function as endowment. As required by GAAP, net assets associated with endowment funds, including funds designated by the Executive Council to function as endowments, are classified and reported based on the existence or absence of donor-imposed restrictions.

The Diocese has interpreted Texas State Law as requiring it to periodically evaluate the amounts to be preserved as permanently restricted funds for those donor-restricted endowment funds subject to Uniform Prudent Management of Institutional Funds Act (UPMIFA). In making such evaluation, the Diocese considers such factors as (a) the duration and permanence of the fund, giving priority to the donor's intent that the fund be maintained permanently; (b) the purposes of the Diocese and the fund; (c) general economic conditions; (d) the possible effects of inflation and deflation; (e) the expected total return from income and the appreciation of investments; (f) other resources of the Diocese; and (g) the investment policy of the Diocese.

# Episcopal Diocese of Dallas of the Protestant Episcopal Church

## Notes to Consolidated Financial Statements

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**Investment objectives and spending policy** – The Diocese's investment objective is to earn inflation-offsetting returns that preserve the real value of the assets and, where possible, earn enhanced returns to achieve the spending objectives of the programs supported by the endowments. Endowment assets include donor-restricted funds that the Diocese must hold in perpetuity, as well as board-designated funds. The endowment assets are invested in a diversified investment portfolio designed to achieve a balance of income and growth objectives within prudent risk constraints.

After maintaining the real value of the permanent endowment funds, any remainder of total return is available for appropriation. State law allows the Diocese to appropriate so much of net appreciation as is prudent considering the Diocese's long-term and short-term needs, present and anticipated financial requirements, and expected total return on its investments, price level trends, and general economic conditions.

Changes in the endowment fund composition for the fiscal years ended December 31, 2024 and 2023:

	2024		
	Without Donor Restriction	With Donor Restriction	Total
Endowment fund, beginning of year	\$ 2,615,006	\$ 1,951,342	\$ 4,566,348
Investment return			
Investment income	140,257	102,410	242,667
Net realized and unrealized gains	141,928	136,464	278,392
Total investment return	282,185	238,874	521,059
Contributions, reversions and changes in donor restrictions	-	-	-
Appropriation of endowment assets for expenditures	(110,121)	(139,308)	(249,429)
Endowment fund, end of year	\$ 2,787,070	\$ 2,050,908	\$ 4,837,978

## Episcopal Diocese of Dallas of the Protestant Episcopal Church

### Notes to Consolidated Financial Statements

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	2023		
	Without Donor Restriction	With Donor Restriction	Total
Endowment fund, beginning of year	\$ 2,332,173	\$ 1,978,995	\$ 4,311,168
Investment return			
Investment income	97,200	77,028	174,228
Net realized and unrealized gains	297,061	231,919	528,980
Total investment return	394,261	308,947	703,208
Contributions, reversions, and changes in donor restrictions	-	-	-
Appropriation of endowment assets for expenditures	(111,428)	(336,600)	(448,028)
Endowment fund, end of year	\$ 2,615,006	\$ 1,951,342	\$ 4,566,348

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level the donor or UPMIFA requires the Diocese to retain as a fund of perpetual duration. As of December 31, 2024 and 2023, no endowment funds were considered underwater.

#### Note 9 – Concentrations of Risk

Two parishes comprise approximately 43% and 44% of total assessments received by the Diocese for the years ended December 31, 2024 and 2023, respectively. The Diocese had cash deposits with financial institutions that exceeded the Federal Deposit Insurance Corporation insured limit at various times during the years ended December 31, 2024 and 2023. If any of the financial institutions with whom we do business were to be placed into receivership, we may be unable to access the cash we have on deposit with such institutions. If we are unable to access our cash and cash equivalents as needed, our financial position and ability to operate our business could be adversely affected.

#### Note 10 – Commitments and Contingencies

The Diocese is party to various claims and complaints arising in the normal course of operations. In the opinion of management, all such matters are without merit, and an unfavorable disposition would not have a material effect on the financial position of the Diocese. Furthermore, the Diocese anticipates no losses due to environmental issues or hazardous employee working conditions.

## **Supplementary Information**

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**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidating Schedule of Financial Position by Fund Type and Entity**  
**December 31, 2024**

	Diocese Funds						
	Operating Funds	Special Funds	EOE	All Saints Camp	Mission	Eliminations	Total
<b>ASSETS</b>							
Cash and cash equivalents	\$ 901,694	\$ 526,780	\$ 18,678	\$ 5	\$ 21,740	\$ -	\$ 1,468,897
Investments	-	3,496,968	2,768,392	-	-	-	6,265,360
Accounts receivable, inter-entity	1,713	-	-	-	-	-	1,713
Prepays and other assets	69,731	-	-	-	-	-	69,731
<b>TOTAL ASSETS</b>	<b>\$ 973,138</b>	<b>\$ 4,023,748</b>	<b>\$ 2,787,070</b>	<b>\$ 5</b>	<b>\$ 21,740</b>	<b>\$ -</b>	<b>\$ 7,805,701</b>
<b>LIABILITIES AND NET ASSETS</b>							
<b>LIABILITIES</b>							
Accounts payable	\$ 539	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 539
Accrued liabilities	108,390	-	-	-	-	-	108,390
Post-retirement benefit obligation	352,253	-	-	-	-	-	352,253
<b>Total liabilities</b>	<b>461,182</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>461,182</b>
<b>NET ASSETS</b>							
Without donor restrictions							
Undesignated	(58,379)	6,537	-	5	21,740	-	(30,097)
Board-designed endowment fund, Endowment of the Episcopate	-	-	2,787,070	-	-	-	2,787,070
Designated - board reserves	570,335	168,624	-	-	-	-	738,959
<b>Total without donor restrictions</b>	<b>511,956</b>	<b>175,161</b>	<b>2,787,070</b>	<b>5</b>	<b>21,740</b>	<b>-</b>	<b>3,495,932</b>
With donor restrictions							
Purpose restricted	-	1,797,679	-	-	-	-	1,797,679
Endowment funds accumulated gains	-	995,005	-	-	-	-	995,005
Endowment funds restricted in perpetuity	-	1,055,903	-	-	-	-	1,055,903
<b>Total with donor restrictions</b>	<b>-</b>	<b>3,848,587</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3,848,587</b>
<b>Total net assets</b>	<b>511,956</b>	<b>4,023,748</b>	<b>2,787,070</b>	<b>5</b>	<b>21,740</b>	<b>-</b>	<b>7,344,519</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 973,138</b>	<b>\$ 4,023,748</b>	<b>\$ 2,787,070</b>	<b>\$ 5</b>	<b>\$ 21,740</b>	<b>\$ -</b>	<b>\$ 7,805,701</b>

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidating Schedule of Financial Position by Fund Type and Entity**  
**December 31, 2023**

	Diocese Funds						
	Operating Funds	Special Funds	EOE	All Saints Camp	Mission	Eliminations	Total
<b>ASSETS</b>							
Cash and cash equivalents	\$ 1,091,879	\$ 742,060	\$ 18,358	\$ 12,380	\$ 1,435	\$ -	\$ 1,866,112
Investments	-	3,473,404	2,596,648	-	-	-	6,070,052
Assessments receivable	-	80,000	-	-	-	-	80,000
Accounts receivable, inter-entity	54,360	-	-	-	-	-	54,360
Prepays and other assets	5,392	-	-	-	-	-	-
<b>TOTAL ASSETS</b>	<b>\$ 1,151,631</b>	<b>\$ 4,295,464</b>	<b>\$ 2,615,006</b>	<b>\$ 12,380</b>	<b>\$ 1,435</b>	<b>\$ -</b>	<b>\$ 8,075,916</b>
<b>LIABILITIES AND NET ASSETS</b>							
<b>LIABILITIES</b>							
Accounts payable	\$ 12,014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,014
Post-retirement benefit obligation	357,485	-	-	-	-	-	357,485
<b>Total liabilities</b>	<b>369,499</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>369,499</b>
<b>NET ASSETS</b>							
Without donor restrictions							
Undesignated	(142,390)	6,537	-	12,380	1,435	-	(122,038)
Board-designed endowment fund, Endowment of the Episcopate	-	-	2,615,006	-	-	-	2,615,006
Designated - board reserve	924,522	556,624	-	-	-	-	1,481,146
<b>Total without donor restrictions</b>	<b>782,132</b>	<b>563,161</b>	<b>2,615,006</b>	<b>12,380</b>	<b>1,435</b>	<b>-</b>	<b>3,974,114</b>
With donor restrictions							
Purpose restricted	-	1,780,961	-	-	-	-	1,780,961
Endowment funds accumulated gains	-	895,439	-	-	-	-	895,439
Endowment funds restricted in perpetuity	-	1,055,903	-	-	-	-	1,055,903
<b>Total with donor restrictions</b>	<b>-</b>	<b>3,732,303</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3,732,303</b>
<b>Total net assets</b>	<b>782,132</b>	<b>4,295,464</b>	<b>2,615,006</b>	<b>12,380</b>	<b>1,435</b>	<b>-</b>	<b>7,706,417</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 1,151,631</b>	<b>\$ 4,295,464</b>	<b>\$ 2,615,006</b>	<b>\$ 12,380</b>	<b>\$ 1,435</b>	<b>\$ -</b>	<b>\$ 8,075,916</b>

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidating Schedule of Activities by Fund Type and Entity**  
**December 31, 2024**

	Diocese Funds			All Saints Camp	Mission	Eliminations	Total
	Operating Funds	Special Funds	EOE				
REVENUES AND SUPPORT							
Assessment revenue	\$ 3,654,057	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,654,057
Contributions	125,000	314,613	-	-	-	(90,000)	349,613
Investment return	17,072	350,570	262,064	-	-	-	629,706
Endowment of the Episcopate grant	90,000	-	-	-	-	(90,000)	-
Other	-	-	-	-	21,731	-	21,731
Total revenues and support	3,886,129	665,183	262,064	-	21,731	(180,000)	4,655,107
EXPENSES							
Grants and support	2,226,752	936,899	90,000	-	1,426	(180,000)	3,075,077
Personnel	1,306,192	-	-	-	-	-	1,306,192
Operating expenses	290,629	-	-	12,375	-	-	303,004
Convention and travel	260,070	-	-	-	-	-	260,070
Reserve	44,222	-	-	-	-	-	44,222
Total expenses	4,127,865	936,899	90,000	12,375	1,426	(180,000)	4,988,565
CHANGE IN NET ASSETS, before nonoperating activities	(241,736)	(271,716)	172,064	(12,375)	20,305	-	(333,458)
NONOPERATING ACTIVITIES							
Post-retirement charges other than the service cost component of net periodic benefit cost (Note 9)	(28,440)	-	-	-	-	-	(28,440)
CHANGE IN NET ASSETS	(270,176)	(271,716)	172,064	(12,375)	20,305	-	(361,898)
NET ASSETS, beginning of year	782,132	4,295,464	2,615,006	12,380	1,435	-	7,706,417
NET ASSETS, end of year	\$ 511,956	\$ 4,023,748	\$ 2,787,070	\$ 5	\$ 21,740	\$ -	\$ 7,344,519

**Episcopal Diocese of Dallas of the Protestant Episcopal Church**  
**Consolidating Schedule of Activities by Fund Type and Entity**  
**December 31, 2023**

	Diocese Funds						
	Operating Funds	Special Funds	EOE	All Saints Camp	Mission	Eliminations	Total
<b>REVENUES AND SUPPORT</b>							
Assessment revenue	\$ 3,604,014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,604,014
Camp revenue	-	-	-	379,730	-	(379,730)	-
Contributions	288,500	832,198	-	177,288	-	(177,288)	1,120,698
Investment return	15,949	549,994	377,833	-	-	-	943,776
Endowment of the Episcopate grant	95,000	-	-	-	-	(95,000)	-
Other	-	-	-	16,780	2,935	(16,780)	2,935
Total revenues and support	4,003,463	1,382,192	377,833	573,798	2,935	(668,798)	5,671,423
<b>EXPENSES</b>							
Grants and support	2,227,871	1,338,600	95,000	-	2,533	(200,641)	3,463,363
Personnel	1,344,908	-	-	191,018	-	(191,018)	1,344,908
Operating expenses	276,810	-	-	276,390	-	(276,390)	276,810
Utilities and maintenance	-	-	-	99,850	-	(99,850)	-
Convention and travel	169,521	-	-	-	-	-	169,521
Depreciation	-	-	-	193,418	-	(193,418)	-
Total expenses	4,019,110	1,338,600	95,000	760,676	2,533	(961,317)	5,254,602
CHANGE IN NET ASSETS, before periodic benefit costs	(15,647)	43,592	282,833	(186,878)	402	292,519	416,821
<b>NONOPERATING ACTIVITIES</b>							
Post-retirement charges other than the service cost component of net periodic benefit cost (Note 9)	(17,239)	-	-	-	-	-	(17,239)
Forgiveness of note payable	-	-	-	1,153,100	-	(1,153,100)	-
Lease assignment contribution expense	-	-	-	(3,428,894)	-	3,428,894	-
CHANGE IN NET ASSETS	(32,886)	43,592	282,833	(2,462,672)	402	2,568,313	399,582
CHANGE IN NET ASSETS FROM DISCONTINUED OPERATIONS NET OF INTERCOMPANY ELIMINATION	-	-	-	-	-	(2,568,313)	(2,568,313)
NET ASSETS, beginning of year	815,018	4,251,872	2,332,173	2,475,052	1,033	-	9,875,148
NET ASSETS, end of year	\$ 782,132	\$ 4,295,464	\$ 2,615,006	\$ 12,380	\$ 1,435	\$ -	\$ 7,706,417



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