

The Vestry was called to order at 7:00 pm, once a quorum (2/3) was present.
 The minutes of the February 2022 Vestry meeting were accepted.

Attendance

Nicholas Morris-Kliment (Rector)	X	Dusty Hecker (Warden)	R	Vacant (Warden)		Vacant (Treasurer)	
MaryAnn Ryan (Clerk)	X	Pete Lyons	X	Kathryn Mortimer	R	Cecile Leroy	R
John Carr		Duncan Allen	R	Lesley Day		Ginny Yerardi	X
Tedi Eaton	X	Alyssa Kence	X	Joe Sweeney		Christina O'Connell	X
Jim Black	R	Rev. Lauren Lukeson (Guest)	X	X=present		R=attended remotely	

Prayer and Formation

Opening prayers were led by Nick. The Lectio Divina method of bible study was used to study Isaiah 12:26.

Gathering and Common Life:

Parochial Report: Nick gave an introduction to the report. It is a snapshot of the congregation's life. Nick said that the number of members reported last year is an important number, but the numbers below that in the report are more telling, showing how many people show up, and how many are in good standing based on attendance and evidence of presence. The service register may be a little more accurate. The Diocesan assessment is based on revenue, and establishes a floor for clergy compensation. The national church publishes statistics from parochial reports.

A motion was made to approve the 2021 Parochial Report; it was seconded; and all Vestry members voted to approve.

Response to Diocesan Audit for 2020: Duncan Allen discussed the draft response, which contained a synopsis of comments from the diocesan auditor to which the Vestry needs to respond, as well as draft responses reviewed by the Finance Committee. A few new people on that committee may help with following up on the responses. Regarding the bank reconciliation matter, the materiality of this discrepancy is not big, a few hundred dollars. We are watching the accounts. Maryann Badejo does reconciliation. Janet Haines has become more active with regards to the checking account. Regarding documentation of fund restrictions, restrictions were identified in 2017, and no significant change has occurred since then except for creation of one new fund (Scripture Study).

A motion was made to approve the draft Vestry responses to go to the diocese, it was seconded, and approved by all. Thanks to Duncan and Gail Murphy.

The diocese has a group of people like Gail Murphy who perform the audits and can advise on related issues. We pay her a nominal amount for her work.

Nick welcomed the Rev. Lauren Lukeson, who will be the first supply priest during his sabbatical. She spoke briefly about her background. Her background is in music, education, music therapy, and early childhood development. She was sponsored by St. Pauls, Brookline.

Calendar and chart of responsibilities: Vestry will have phone numbers for people to contact in responsibility matrix. The plan is to fill in the Matrix. The work Emily is doing can be supported by the

whole parish. There is a need to have knowledge of who has the keys, and a list of phone numbers of people in positions of responsibility.

Dusty Hecker spoke about Diocesan suggestion about a Covid Respite, the suggestion to have staff and clergy have a two week paid respite. Dusty suggested that taking 2 weeks off might not be so smart just when people are coming back to church. Perhaps this is not urgent, and we will look into it.

Prayer/Adjournment

Final prayers were led by Nick.

Calendar:

This Saturday, March 26, from 2-3:30 at Christ Church, Cecile Leroy's band Chimney Swift is playing.

Minutes taken by MaryAnn Ryan, Clerk of the Vestry

 /s/MaryAnn Ryan

Date: 3-22-22



Vestry Agenda

Tuesday, March 22, 2022

7:00-9:00 pm

Chair: Dusty **Clerk:** MaryAnn

Opening Prayers (7:00-7:20) (Nick)

Common Life (7:20-8:00)

Parochial Report – (Nick)

Parish Audit – (Duncan)

Sabbatical - Nick

The Rev. Lauren Lukasen

Draft Decision Matrix

Draft Calendar

Decisions (8:00-8:15)

Parochial Report Motion

Parish Audit Motion

Parking Lot/ Other Business

Prayer and Adjourn

Dates:

April 5, 7:00pm Vestry

May 10, 7:00pm Vestry

Holy Week

April 10, Palm Sunday, 1 Service 10:00am

April 14, Maundy Thursday Worship Service 5:30pm

April 15, Good Friday, 7 Last Words @ 12:00 Noon in the Main Church

April 17, Easter Sunday Worship at 9:00am and 11:00 am, Egg Hunt at 10:30am

Sabbatical Priests:

The Rev. Lauren Lukasen May 16-July 3, 2022

The Rev. Brock Baker July 4-August 14, 2022

Attachments/links: Draft 2021 Parochial Report; 2020 Audit Motions; Draft Sabbatical Calendar; Draft/In-process Sabbatical Decision Matrix

Loving God and neighbor as Jesus teaches

THE 2021 SPECIAL REPORT OF EPISCOPAL CONGREGATIONS AND MISSIONS
ACCORDING TO CANONS I.6, I.7, AND I.17
(OTHERWISE KNOWN AS THE PAROCHIAL REPORT)



Name of Congregation Christ Church Episcopal		Diocese Massachusetts	
Street Address 1 1132 Highland Ave		City Needham	State MA
Street Address 2	Zip + 4 02494	County Norfolk	Country United States
Mailing Address 1 1132 Highland Ave		City Needham	State MA
Mailing Address 2	Zip + 4 02494	County Norfolk	Country United States
Congregation's Email address office@ccneedham.org		Congregation's Web Address www.ccneedham.org	Phone # 781-444-1469
Federal Tax ID # 042182423			

Report Preparation

Membership, Attendance, & Services prepared by (Print or type name) Ali Heard	Email Address office@ccneedham.org	Daytime Phone 781-444-1469 x110
Stewardship & Financial Prepared by (Print or type name) Duncan Allen	Email Address d2allen@ibigroup.com	Daytime Phone 339-225-2035

Certified by the Clerk of the Vestry

Certified by (Print or type name) MaryAnn Ryan	Email Address 20mryan@gmail.com	Daytime Phone 781-444-1469
Signature		Date 03/22/2022

Certified by Treasurer/Financial Officer

Certified by (Print or type name)	Email Address	Daytime Phone
Signature	Date	

Certified by Rector/Vicar/Person in Charge

Certified by (Print or type name) Nicholas M. Morris-Kliment	Daytime Phone 781-444-1469 x 113	Email Address nick@ccneedham.org
Signature		Date 03/22/2022

Warden/Vestry Approval

Warden (Print or type name) Vestry	Email Address office@ccneedham.org	Daytime Phone 781-444-1469
Indicate date that your 2021 Parochial Report was approved by the Vestry or Bishop's Committee (Canon I.6.1)		Date 03/22/2022

Parochial Report Completion

How many people participated in completing this parochial report?	3
Please identify the roles of those who participated in completing this parochial report (Not including vestry members who only voted to approve it):	Rector/Vicar, Vestry Member, Staff Member

Membership, Attendance and Services of the Reporting Congregation

Using Last Year's Report:

Using the 2020 Parochial Report, record the Number of Baptized Members Reported as of December 31, 2020.
(See your 2020 Parochial Report, Box M20)

Active Baptized Members of the Reporting Congregation Reported Last Year

Members Reported Last Year = M20.

587

Using the Register of Church Membership and Rites:

During the Report Year
Increases in Membership

1. **Increases during year:** All members added to the baptized members section of your congregation's Membership Register during 2021 by: baptism, confirmation/reception, or transfer; and those persons restored from inactive status, or not counted in last year's membership count. **Total Increases = 1.**

7

Decreases in Membership

2. **Decreases during year:** All baptized members lost by death, transferred to another congregation, removed to inactive status in the Register of Church Membership and Rites, removed for other reasons, or not removed from last year's membership count. **Total Decreases = 2.**

10

Active Baptized Members of the Reporting Congregation At Year-End

M21: Add the increases entered in Box 1 to Box M20. Then subtract the decreases entered in Box 2 for the total active membership as of December 31, 2021

Total Active Baptized Members (end of report year) = M21.

584

Communicants in Good Standing of the Reporting Congregation

Communicants in good standing: Baptized members of the reporting congregation, who "have received Holy Communion at least three times during the preceding year" and are faithful "in corporate worship, unless for good cause prevented," and "in working, praying, and giving for the spread of the Kingdom of God."

Adults

3. Adult communicants in good standing (age 16 and over) =

3. 137

Youth

4. Youth communicants in good standing (under age 16) =

4. 48

5. **Total communicants in good standing (3 + 4) =**

5. 185

Others Active

6. **Others who are active** whose baptisms are *not* recorded in the Parish Register, or in another Episcopal congregation.

Others = 6. 0

Using the Service Register:

Average Sunday Attendance for 2021

7. **Sunday (& Saturday Evening) Attendance:** Divide total attendance by the total number of Sundays when services were held.

Total attendance 1,512 ÷ Total # of Sundays when services were held 34

Average Sunday Attendance = 7. 44

Easter Attendance in 2021

8. Average Principal Worship Service Attendance on a Weekday (in congregations without Sunday or Saturday evening services)

8. 0

9a. Total In-person Easter Sunday Attendance (including Easter Vigil):

9a. 0

9b. Total In-person Christmas Eve and Christmas Day Attendance:

9b. 158

Sacraments & Services:

Number of Holy Eucharists Celebrated During 2021

Provide information for in-person and online separately.

10. Total Sunday & Saturday Evening Eucharists

	In-person	Online
(10)	48	22
(11)	0	2
(12)	12	0
(13)	2	0
(14)	20	12
(15)	0	0
(16)	8	0

11. Total Weekday Eucharists

(11) 0

12. Total Private Eucharists

(12) 12

Daily Offices and Other Services Held During 2021

13. Daily Offices Held on Sunday

(13) 2

14. Daily Offices Held on Weekdays

(14) 20

15. Marriages conducted in 2021

(15) 0

16. Burials conducted in 2021

(16) 8

Using the Register of Church Membership and Rites:

Baptisms in 2021

17. Baptisms 16 years and older

(17) 0

18. Baptisms under 16 years of age

(18) 5

Confirmations in 2021

19. Confirmations 16 years and older

(19) 0

20. Confirmations under 16 years of age

(20) 0

Received in 2021

21. Received by a bishop

(21) 0

Education:

Children and Youth

22. Total Church School Students Enrolled

(22) n/a

Adult Education

23. Regular Sunday or weekday adult education programs held?

Yes No

24a. Number of adults engaged in religious education or spiritual formation 38

24b. Number of children and youth engaged in religious education or spiritual formation 8

24c. What was the impact, if any, of the pandemic on participation of children, youth and adults in religious education or spiritual formation?

Select one

- Significantly less
- Less
- About the same
- Slightly more
- Significantly more

24d. How were religious education or spiritual formation programs held?

- In-person
- Online
- Both

Circle all that apply

25. English

26. Other (please list) _____

2021 worship during the Pandemic:

1. In what ways has your community worshipped this year? (Check all that apply)

- In-Person Indoors
- In-Person Outdoors
- Online
- Hybrid

2. Do you track online participants/viewers?

- Yes
- No

2a. If you answered yes, how do you count online participation/viewers?

(examples: Number of devices, unique views, a formula to calculate number of viewers per device)

peak live FB viewers + Zoom Participants+Website views within 2 hours of worship + YouTube views

2b. Optional: If you have online numbers for worship, what is your average weekly online worship participation?

35

3. What COVID safety measures, if any, were used for attending in-person worship?

(masks, vaccination requirement, etc.)

masked, distanced, communion in one kind

4. What were the source of COVID safety measures taken? Check all that apply:

CDC; Church Committee; County; Diocese/Bishop; State

Racial Justice and Reconciliation:

Empty text area for Racial Justice and Reconciliation responses.

Empty text area for Racial Justice and Reconciliation responses.

5. We invite you to tell stories of how you have spent the last year naming, addressing, and dismantling the injustices of racism in yourselves, congregations, and your communities.

RACIAL JUSTICE INITIATIVE

Christ Church's Racial Justice Initiative completed its first year in October 2021 and continued to meet monthly via Zoom. Since we are a new group for Christ Church, we thought it would be helpful to remind parishioners of our origins and mission.

In the spring of 2020, a series of brutal and senseless deaths involving people of color led many to recognize the ongoing and systemic crisis of racial injustice in America. In response, the Vestry charged our Rector to recruit a group of parishioners to help our parish explore how we are called - individually and together - to dismantle racism and, in doing so, to truly love our neighbor as Jesus calls us to do.

Whereas, it is the call of Episcopal Christians by our Baptismal Covenant (BCP, p. 305) to seek and serve Christ in all persons loving our neighbor as ourselves; and to strive for justice and peace among all people, respecting the dignity of every human being; and Whereas, we believe that all humans are created in the Divine Image (Genesis 1.27-28); and Whereas, it is the call of all Christians to be "ministers of reconciliation" (2 Corinthians 5.18);

Therefore, the Vestry of Christ Church, Needham, Massachusetts, as leaders of this Christian community, acknowledges the inequity of racism.

In response, we will exert ourselves beyond our convenience to love our neighbors as ourselves by prayerfully:

~committing to exploration, listening, and reflection to understand the nature and sources of these sins.

~committing to engage in just actions and practices which promote the equality and dignity of all people.

The Racial Justice Initiative was formed as a direct result of this charge. It was and still is co-chaired by Bob Keener and Cynthia Anderson, and currently includes these additional founding members: John Carr, Heidi Fieldston, Janet Haines, Sandy Kastantin, Donna Vello and our Rector Nick.

Our first offering to the parish was the 21-day Racial Equity Challenge, which participants found to be very powerful. Led by Heidi Fieldston, the program prompted daily explorations of race, racial identity, and racism with the goal of making such personal explorations a regular habit. For those who are interested in addressing racism, it can be helpful to be "ever mindful" - especially when our history tends toward ignoring racism and the harm it causes.

Later in the year, the group decided to work with the Vestry to endorse a strong statement about our parish's stance against racism. We had two very fruitful discussions with Vestry that focused on our initial proposed statement and then a revised version. Through those discussions, we found that

strongly held beliefs differed enough that consensus would be difficult. In the end, we decided to table that effort and turned attention to finding offerings for our parish and other opportunities for education and action.

We decided to offer an Episcopal Church program called Sacred Ground. Luckily, Nick found parishioners at St. Paul's in Natick who had participated in the program and were planning another one. They welcomed us and we partnered with them to offer it starting in late January or early February of 2022.

The program is designed specifically for Episcopal Churches and features documentary films and readings that focus on Indigenous, Black, Latino, and Asian/Pacific American histories as they intersect with European American histories. In the words of the curriculum introduction, guided discussions are designed to help participants "peel away the layers that have contributed to the challenges and divides of the present day - all while grounded in our call to faith, hope and love."

The Racial Justice Initiative group will keep meeting to plan additional offerings and actions. We are also ready to welcome other interested parishioners. Please consider joining us!

Stewardship and Financial Information of the Reporting Congregation**Giving Information for 2021:**

		Reporting currency: <u>US Dollar (United States)</u>	
Number of Pledges	1.	Number of signed pledge cards for 2021-report year	(1) 110
Total \$ Pledged	2.	Total dollar amount pledges for 2021-report year	(2) 338,108

Report of Revenues and Expenses for 2021:

Operating Revenues	3.	Plate offerings, pledge payments & regular support	(3) 374,940
	4.	Money from investments used for operations in 2021	(4) 42,409
	5.	Other operating income, including unrestricted gifts & restricted gifts used for operations, & contributions from congregation's organizations • Include your Paycheck Protection Program (PPP) loan in line 5 only if it has been converted to a grant. • Enter the amount of your PPP loan on the next page (line 22) whether or not it was converted.	(5) 117,554
	6.	Unrestricted bequests used for operations	(6) 0
		Subtotal Normal Operating Income (3 + 4 + 5 + 6) = A	534,903

	7.	Assistance from diocese for operating budget	(7) 0
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		Total Operating Revenues (A + 7) = B	534,903
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Non-Operating Revenues	8.	Funds received for capital projects	(8) 0
	9.	Additions to endowment, & other investment funds	(9) 0
	10.	Contributions & grants for congregation based outreach & mission programs	(10) 0
	11.	Funds for transmittal to other organizations	(11) 0

		Subtotal Non-Operating Revenues (8 + 9 + 10 + 11) = C	0
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		Total All Revenues (B + C) = D	534,903
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Operating Expenses	12.	To diocese for assessment, apportionment, or fair share	(12) 65,019
	13.	Outreach from operating budget	(13) 15,425
	14.	All other operating expenses	(14) 416,692

		Subtotal Operating Expenses (12 + 13 + 14) = E	497,136
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Non-Operating Expenses	15.	Major improvements & capital expenditures	(15) 17,958
	16.	Expense for congregation's outreach & mission	(16) 0
	17.	Funds contributed to Episcopal seminaries	(17) 0
	18.	Funds transmitted to other organizations	(18) 0

		Subtotal Non-Operating Expenses (15 + 16 + 17 + 18) = F	17,958
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		Total All Expenses (E + F) = G	515,094
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At Year-End:

As of December 31, 2021	19.	Total cash in all checking & savings accounts	(19) 145,980
	20.	Total investment at market value (not including cash reported in line 19)	(20) 2,335,351

Continuing Stewardship and Financial Information of the Reporting Congregation**Information for 2021:**

21. If your congregation received a Paycheck Protection Program loan in 2020, was the loan forgiven in 2021? Yes No
If yes, how much was forgiven? 39,200
22. Did your congregation qualify and apply for a second round Paycheck Protection Program (CARES Act) loan for 2021? Yes No
23. Did your congregation receive a Paycheck Protection Program loan for 2021? Yes No
If yes, how much did your congregation receive? 0
24. Has the 2021 loan been forgiven?
 Yes No In process Have not applied yet
If yes, how much was forgiven? 0
25. Please provide an estimate of additional expenses your congregation incurred in 2021 due to the pandemic (equipment for broadcasting services, Zoom and other subscriptions, personal protective equipment, sanitizing supplies, additional liturgical expenses, etc.). 7,000
26. If you have an endowment or reserve funds, how did usage of those funds in 2021 change compared to 2020?
 Increased Decreased Same
27. If you take an endowment draw, what was the percentage draw for 2021? 3.97
28. How significant was the actual negative impact of the pandemic on your congregation's finances for 2021, compared to the answer you provided last year (item 27, page 5)?
 Very significant Somewhat significant Neutral Somewhat insignificant Very insignificant
Comments:
29. How significant is the negative impact of the pandemic on your congregation's finances for 2022?
 Very significant Somewhat significant Neutral Somewhat insignificant Very insignificant
Comments:
30. Does the congregation have any outstanding debt? Yes No
If yes, how much? 20,270
What is the debt for? solar panels

Narrative Questions

Clergy, Vestry and Staff are encouraged to participate in answering these questions .

1. Looking toward the future, what changes do you hope to see in your faith community? What does your community need in order to bring about these changes?

1a. A post-covid return of families with children still living at home
1b. A reimagining of the church school curriculum with parental and staff support

2a. A full blooded return of in person fellowship events, including a signature outward facing fundraising event.
2b. A recognition of this hunger, and creative, organizational energy to bring it to pass

Priest(s) Serving this Congregation

Last name of Rector, Vicar, Dean, Priest-in-charge or interim 1. Morris-Kliment	First Name Nicholas	Middle Name M.
Title of position Rector	Year Ordained 2002	Diocese of canonical residence Massachusetts
Employment status at this congregation: <input checked="" type="checkbox"/> Full time <input type="checkbox"/> Part time <input type="checkbox"/> Non-stipendiary	Year called to this congregation: 2014	Church Pension Status <input checked="" type="checkbox"/> Active <input type="checkbox"/> Retiree <input type="checkbox"/> Non-active

Last name of associate priest, assisting priest or curate	First Name	Middle Name
Title of position	Year Ordained	Diocese of canonical residence
Employment status at this congregation: <input type="checkbox"/> Full time <input type="checkbox"/> Part time <input type="checkbox"/> Non-stipendiary	Year called to this congregation:	Church Pension Status <input type="checkbox"/> Active <input type="checkbox"/> Retiree <input type="checkbox"/> Non-active

Last name of associate, assisting or other priest	First Name	Middle Name
Title of position	Year Ordained	Diocese of canonical residence
Employment status at this congregation: <input type="checkbox"/> Full time <input type="checkbox"/> Part time <input type="checkbox"/> Non-stipendiary	Year called to this congregation:	Church Pension Status <input type="checkbox"/> Active <input type="checkbox"/> Retiree <input type="checkbox"/> Non-active

Last name of associate, assisting or other priest	First Name	Middle Name
Title of position	Year Ordained	Diocese of canonical residence
Employment status at this congregation: <input type="checkbox"/> Full time <input type="checkbox"/> Part time <input type="checkbox"/> Non-stipendiary	Year called to this congregation:	Church Pension Status <input type="checkbox"/> Active <input type="checkbox"/> Retiree <input type="checkbox"/> Non-active

If you have more than 4 priests who serve this congregation on a regular basis, complete this form online (where additional blanks will be generated) or attach a page to this paper form.

If you have no priest at present, who leads Sunday worship services? (check all that apply)

Supply priest Deacon Lay Leader Other _____

A long-term supply priest: _____ (Give full name of long-term supply)

Deacon(s) Serving this Congregation

Last name of Deacon	First Name	Middle Name
<input type="checkbox"/> Deacon (Vocational) <input type="checkbox"/> Transitional Deacon	Year Ordained	+

Last name of Deacon	First Name	Middle Name
<input type="checkbox"/> Deacon (Vocational) <input type="checkbox"/> Transitional Deacon	Year Ordained	+

Name(s) of other congregation(s) currently served by these priests (if any)

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Explanation of Unique or Unusual Clergy Situation:

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Outreach Ministries and Volunteer Activity of this Congregation

Using the checkboxes below, please indicate whether your congregation provided any of the following community service or outreach ministries during 2021. If yes, indicate how many volunteers were involved.

For 2021, please estimate in the space provided approximately how many people were new volunteers this year.

Please also estimate in the space provided approximately how many people were helped or served each month by the ministry.

And, for 2021, using the checkboxes below, please indicate whether this is a new ministry for your congregation this year.

	Ministry of the Congregation	Is this a new ministry in 2021?	Estimated number of volunteers involved	Estimated number of new volunteers	Estimated number of people served
			<i>(Provide a total figure only. No symbols or text.)</i>		
1. Food pantry, soup kitchen, or meal projects	<input checked="" type="checkbox"/>	<input type="checkbox"/>	50	0	150
2. Sustainable food garden/cooperative (such as "Farm to Tray")	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
3. Cash, vouchers, or help with rent/utilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6	0	8
4. Day care, preschool, before- or after-school programs	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
5. Tutoring or literacy programs	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
6. Health programs (parish nurse, clinics, health education, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
7. Community organizing, organized social issue advocacy	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
8. Job placement, job training, employment counseling	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
9. Building projects (such as Habitat for Humanity)	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
10. Support groups (bereavement, divorce, job loss, 12-step, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
11. Programs for the elderly and homebound persons	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
12. Clothes closet, thrift store	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
13. Homeless or no-freeze shelter	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
14. Overseas sponsorships, microloans, Heifer Project, Haiti relief	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6	1	300
15. Refugee resettlement	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
16. Ecumenical or Interfaith Partnerships	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0
17. Other, not listed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	0	150
Line 17: Giving Tree at Christmas Time					

Proposed Vestry Motion on Response to Diocesan Audit for 2020

March 22, 2022

The Vestry adopts the following as its response to recommendations received from the diocesan auditor in the summary report for the 2020 audit:

Bank Reconciliation

The 2020 audit recommended that Christ Church “analyze and correct the bank account balance in the system of record to allow for accurate and meaningful bank reconciliations thereby reducing the risk of misappropriation of funds”. The audit noted that in 2020, there was still a discrepancy between the book balance per the reconciliation and the book balance in the system of record. The Vestry believes that this discrepancy can be corrected with a planned realignment of our financial team by the end of 2022.

Chart of Accounts/Financial Reporting

Two aspects of this recommendation originally made in 2017 have yet to be addressed:

- “Set up accounts for all significant assets (land, building, fixtures, capital improvements, investments) and for mortgages, loans and other liabilities such that these can be reported on the Statement of Financial Position”. These accounts exist, but the Vestry have not identified the resources to bring the non-operating accounts into a comprehensive Statement. It is hoped that this can be addressed by our realigned financial team in calendar 2022.
- “Develop a process for reporting fund activity - operating and non-operating – and aligning income and expense accounts with each fund, if possible.” The Vestry recognizes the value of this recommendation, and with the financial team realignment plans for this process to be in place for calendar 2023.

Bank Reconciliations

The 2017 audit recommended that “when a process is in place to produce an accurate Statement of Financial Position, the Treasurer show evidence of his review of bank reconciliations and that a copy of the relevant Statement of Financial Position is filed with a hard copy of the reconciliation and the bank statement.” The Vestry asked the financial team to begin doing this in 2019, and the review was conducted for a few months. Volunteer time resources were not sufficient to maintain this practice. The Vestry hopes that with the transition to electronic banking and the financial team realignment that a process meeting the intent of this recommendation will have been instituted by the end of 2022.

Documentation of Fund Restrictions

The 2017 audit noted that although “there is an accounting of the Church investments, a description of existing restrictions on contributions set by either donors or the vestry is not available. It is recommended that deeds, agreements with donors, and vestry minutes containing vestry restrictions of funds be reviewed by the Church to assure donors' wishes are followed, or in the case of vestry vote, the funds be used according to those self-imposed restrictions or the restrictions be changed formally by vote.” The Vestry notes that a review of these restrictions was undertaken in 2017, and that there has been relatively little new activity since then. At the time, the information was found in archives which are by no means ‘accessible’. The church uses short-form summaries in electronic form to guide individual decisions on the use of restricted funds, which decisions are very infrequent. In 2018 the Vestry formed a committee to advance this task of baselining the information and decided to establish a task force to do an annual review. Neither the committee nor the task force have met, so the prospects for this happening without augmenting administrative resources appear dim.

Christ Church–Sabbatical Worship Calendar (May 15 – August 14, 2022)
Draft

Sunday	Location	Presiding/Preaching		Notes/After Church/During the Week/Other
May 15	One Service 10am Church Honor Confirmand Sabbatical Sendoff	NMMK/ Lauren		Nick Bon Voyage Coffee Hour Honor Confirmands
May 22	8:15am Chapel 10:00am Church	Lauren Lauren		
May 29	8:15am Chapel 10:00am Church	Lauren Lauren		Memorial Day Weekend
June 5	8:15am Chapel 10:00am Church	Lauren Lauren		PENTECOST! Thank Church School Teachers/End of Year Cookout/Firepit? after 10am
June 12	9:00am Chapel	Lauren		First Sunday of Summer Worship Schedule Lemonade Hour after 9:00am begins Starting June 13: Summer Office Schedule M-Th 9:00am to 2:00pm
June 19	9:00am Chapel	Lauren		
June 26	9:00am Chapel	Lauren		Potluck on the Patio?

Christ Church–Sabbatical Worship Calendar (May 15 – August 14, 2022)
Draft

July 3	9:00am Chapel	Lauren		Farewell/Thank You to Lauren
July 10	9:00am Chapel	Brock		Welcome Brock!
July 17	9:00am Chapel	Brock		
July 24	9:00am Chapel	Brock		
July 31	9:00am Chapel	Brock		Potluck on the Patio?
August 7	9:00am Chapel	Brock		
August 14	9:00am Chapel	Brock		
August 21	9:00am Chapel	Nick		Welcome Nick Back at 9am
August 28	9:00am Chapel	Nick		
September 5	9:00am Chapel	Nick		
September 12	8:15am Chapel 10:00am Church 5	Nick Nick		Welcome Back at 10am? Sunday School Registration?

In Process Draft Christ Church Responsibility Matrix – Sabbatical (May 16 – August 14, 2022)

* = Primary Responsibility

● = Supporting

✓ = Available to assist

	Lauren/ Brock	Ali Heard	Woody Hughes	Charles Raines	Dusty Hecker	Pastoral Response Ministry	Maryann Badejo	Property Team	Worship and Arts Team	Emily Garcia	Coffee Hour Team	
Presiding	*											
Preaching	*											
Pastoral care	*					●						
Church School Appreciation End of year Picnic										*		
Bldg/Bldg use questions/conflicts			*									
Summer Lemonade Hour												
Bulletin Production												
Weekly eBlasts/Communica tions												
Memorial Flowers												
Calendar												
Church School Support												
Communications: eBlast/website/FB												
Summer Worship Leaders												