

## **Mission Share Incentive Plan**

*Adopted by the 146<sup>th</sup> Annual Convention, effective 2021-2023*

### **ELIGIBILITY**

This plan is open to all parishes/missions of the diocese. To be considered eligible to participate a parish/mission must meet all the following requirements:

- Be current on its annual Mission Share payments, according to Canon XIII, Section 6, by making regular monthly Mission Share payments for the current year per its assigned percentage rate or calculated 1/12th rate amount; if a parish/mission prefers to make an annual payment (lump sum) the total estimated payment must be received by January 15 of the current year.
- File its Parochial Report online and a copy mailed/emailed into the diocesan office, all by the March 1 deadline. The signed, vestry approved paper/scanned copy of the Parochial Report must also include the unaudited Statement of Activities (YTD Income/Expense Statement) and Statement of Financial Position (Balance Sheet) for the year filed.
- File its Annual Reporting Form online with the diocese by the April 1 deadline.
- File its Audit by the September 1 deadline along with all required supporting documentation.

If a parish/mission fails to fulfill all of the above requirements, it is ineligible for the incentive plan.

### **PLAN GUIDELINES**

- Eligible parishes/missions which meet any of the Growth Criteria outlined below obtain a specific percent rebate to be applied as a credit to its annual Mission Share for the subsequent year.
- For each growth criterion met, a percent amount of rebate will be obtained, per the Growth Criteria schedule below. If a parish/mission meets multiple criteria those percentages obtained are added to determine the total obtained percent rebate. The maximum percentage rebate that a parish/mission can obtain for the current year is 5% if the parish/mission meets all the growth criteria.
- The total percent rebate obtained by meeting the growth criteria is then applied to the total amount of Mission Share paid for the current year to calculate the dollar amount of the rebate. That dollar amount rebate is then credited towards the parish/mission's subsequent year's Mission Share.
- Meeting the Growth Criteria is determined and calculated each year during the diocesan end-of-year review of Mission Share, Parochial Report, and Annual Reporting data.
- If a parish/mission still owes monies determined by the end-of-year true up, any rebate credit will be held until such owed payments are made. If owed payments are not made in full by the June 30 deadline the credit shall be forfeited.

## **GROWTH CRITERIA**

Below are the growth criteria for eligible parishes/missions. Each criterion has a percent amount assigned which is used in calculating the rebate dollar amount.

- Parish/mission meets all four Eligibility Requirements = 2% rebate
- Parish/mission increases Operating Income from the previous year by either 3% or \$10,000 (Parochial Report, Box A) = 1.5% rebate
- Parish/mission increases budgeted Outreach spending by 10% from the previous year (Parochial Report Line 13) = 1.5% rebate
  - Examples of qualified outreach spending: contributions to charitable non-profit organizations, benevolence assistance, support of overseas missionaries, donations to Episcopal Communities Ministries, assuming expenses of a Twelve Step program meeting at the church, a community outreach ministry, or other outreach ministry guided by the diocesan Becoming Beloved Community initiative.
  - Mission Share payments to the diocese do not qualify as an outreach expense for this plan.

## **EXAMPLE**

In 2020, St. Swithen's makes all its monthly Mission Share payments, for an annual total of \$50,000. In 2020 St. Swithen's files its Parochial Report, diocesan annual report, and parish audit on time. St. Swithen's also increased its budgeted outreach spending by 15%. St. Swithen's meets the eligibility requirements to participate in the incentive plan. Based on the Growth Criteria schedule, at the end of 2020 St. Swithen's will receive a total 3.5% rebate (2% for meeting all the eligibility requirements, plus 1.5% for the increased budgeted outreach spending). This total rebate percent is then applied to the Mission Share amount that was paid in 2020, thus 3.5% of \$50,000, which is \$1,750. St. Swithen's will have \$1,750 credited towards its 2021 Mission Share payments.