



## The Episcopal Diocese of Louisiana

Dear Diocesan Leaders,

Enclosed, you will find a hard copy of this year's Annual Report form along with instructions about how to file your Parochial Report for the National Church online.

The Annual Report is a tool our diocese has established to help gather useful information about your parish. It serves as the foundation for our budgeting process and offers our staff a glimpse into your parish's overall operational health.

The Parochial Report was established by the Constitution and Canons of The Episcopal Church as a tool for the collection of data that is intended to assist the Church in planning for mission. They are to be completed each calendar year and are filed online with the Episcopal Church at: <https://reports.dfms.org>. Once you have filed the report online you will need to download a copy, print it and mail it in to the diocesan office. Instructions and workbooks for filing the Parochial report can be found by visiting our diocesan website ([www.edola.org](http://www.edola.org)) and clicking on the "Resources" drop down menu and selecting "Parochial Reports."

***The Annual Report Form along with a hard copy of the Parochial Report with signatures must be submitted to the diocese no later than March 1.*** The reports must be approved by the church's vestry or Bishop's advisory committee. The Constitution and Canons require the submission of the reports or else the right to vote at diocesan convention could be jeopardized (please read Canon 23 Section 2). In addition to canonical consequences, late reporting hinders the budget planning process for our diocese. We cannot calculate assessments accurately, draft the budget or move forward with strategic financial planning. Please make the filing of these reports a priority in your office so that our office may continue to serve you efficiently.

Completed packets are to be mailed to:

The Rev. Canon Morgan M. MacIntire  
The Canon to the Ordinary  
The Episcopal Diocese of Louisiana  
1623 Seventh St  
New Orleans, LA 70115

If you are unable to complete the annual report by this date, please contact me ([mmacintire@edola.org](mailto:mmacintire@edola.org)) to request an extension in filing the annual report. If you have any questions about the content of the reports, please reach out to my Executive Assistant, Tamika Gerhardt ([tgerhardt@edola.org](mailto:tgerhardt@edola.org)).

Faithfully,

A handwritten signature in black ink that reads "Morgan M. MacIntire" followed by a small cross symbol.

The Reverend Canon Morgan M. MacIntire



Annual Report of a Parish, Mission or Chapel  
for the year ending 31 December 2023  
Due Date: March 1, 2024

Name of Congregation: \_\_\_\_\_

Address: \_\_\_\_\_

**PART 1:** The Parochial Report (enclosed) is required by the Canons of the Episcopal Church. *Please return the completed form to the Bishop's office with your Annual Report.*

In addition to a printed Parochial Report being a part of this Annual Report to the Bishop, each congregation is required to file the Parochial Report with the office of the General Convention. That filing may be done online at <https://reports.dfms.org/>, beginning **2 January 2024** by using the Login name and Password chosen by your church. Workbooks to assist in the completion of the Parochial Report may be found online at [www.edola.org](http://www.edola.org) under Resources or at <https://www.generalconvention.org/forms-and-instructions>. If you have questions, you may also contact the Rev. Canon Morgan MacIntire at [mmacintire@edola.org](mailto:mmacintire@edola.org) or by calling 504-895-6634.

It is possible to view and print an 11-year trend chart that displays average Sunday attendance, active baptized members and plate and pledge gifts for your church (and all Episcopal congregations and dioceses.) To access this chart go to <https://www.episcopalchurch.org/research-and-statistics/>.

**Parochial Report (a) completed, (b) filed online and (c) included:** Yes\_\_\_\_\_ No\_\_\_\_\_

**PART 2: Financial Statements**

Please enclose all financial statements (balance sheets and income statements) associated with your Parish, Mission, or Chaplaincy (including schools, day care centers, etc.) for the twelve-month period ending 31 December 2023.

**Financial Statements included:** Yes\_\_\_\_\_ No\_\_\_\_\_

### **PART 3: Audits**

Diocesan Canon 25.1.(d) requires that “all accounts shall be audited annually by a Certified Public Accountant, or by an accounting committee approved by the Vestry.” Please enclose the congregation’s audit report(s) for the twelve-month period ending 31 December 2023.

For congregations with a Normal Operating Income of less than \$500,000.00, the Executive Board has authorized the use of an *Alternative Audit Procedure*. If you have questions about the proper use of this alternative procedure, please contact the Canon to the Ordinary or the Diocesan Treasurer. CPA Audit Reports and Alternative Audit Reports are due **September 27, 2024**.

***CPA Audit Report included:*** Yes \_\_\_\_\_ N/A \_\_\_\_\_

***CPA Audit in process, to be forwarded when complete:*** Yes \_\_\_\_\_ N/A \_\_\_\_\_

***Alternative Audit Procedure Report completed and included:*** Yes \_\_\_\_\_ N/A \_\_\_\_\_

***Alternative Audit Procedure Report in process:*** Yes \_\_\_\_\_ N/A \_\_\_\_\_

### **PART 4: Discretionary Fund Certification**

Clergy “Discretionary Funds” are church-owned funds utilized by clergy for pious and charitable purposes to relieve the indigent and to provide for parishioners in need. They are established by national canon (Title III Canon 9.5) for this purpose. They are to be independently reviewed on a quarterly basis in such a way as to insure both the proper use and confidentiality of monies.

Please enclose a letter from the vestry (signed by the Senior Warden) certifying that all such funds for the twelve-month period ending 31 December 2023 have been reviewed, and the procedures outlined in the Diocesan Policy on Clergy Discretionary Funds have been and are being followed.

***Discretionary Fund Certification included:*** Yes \_\_\_\_\_ N/A \_\_\_\_\_

### **PART 5: Background Checks and Boundaries Training**

To insure a safe environment for our parishioners and visitors, and with the advice of the Church Insurance Company, the Bishop and Executive Board have set as policy a requirement that all clergy and lay staff (church and school) undergo criminal, credit and DMV background checks. More information can be found by reading the Diocesan Safeguarding Policy, which can be found at <http://www.edola.org/safeguarding>, and complete a session of the *Safe Church/ Safe Communities* training.

Please provide a list of the names of those who have and who have not had these checks and training.

***Background and Training list included:*** Yes \_\_\_\_\_ No \_\_\_\_\_

## **PART 6: Contact Information**

Please provide the names of the members of your congregation's staff and Vestry, as well as contact information for the members of the Vestry (mailing address, telephone number, email address.) Please email a copy to Jessica Lee (jlee@edola.org)

Please email a listing of active members of the congregation, in Excel format, to Tamika Gerhardt (tgerhardt@edola.org). Column headings should include (a) Name, (b) Mailing Address, (c) Email Address, (d) Baptism Date, (e) Confirmation Date, (f) Marital Status, and (g) Adult (18+) or Child Status

**Staff and Vestry Listing included:** Yes\_\_\_\_\_ No\_\_\_\_\_

**Membership Listing emailed to [tgerhardt@edola.org](mailto:tgerhardt@edola.org)** Yes\_\_\_\_\_ No\_\_\_\_\_

## **PART 7: Termite Coverage**

Please provide proof of termite coverage for all buildings under the control of your congregation, as well as the date(s) of the most recent treatment.

**Termite coverage included:** Yes\_\_\_\_\_ No\_\_\_\_\_

## **PART 8: Miscellaneous Documentation that has *changed since the previous year***

**"In-force" letter from insurance provider(s)  
clearly stating coverages, limits, & naming the  
Diocese as an additional insured included:** Yes\_\_\_\_\_ No new letter\_\_\_\_\_

**Letter(s) of Agreement signed in 2023  
with members of the clergy included:** Yes\_\_\_\_\_ No new LoAs\_\_\_\_\_

**Congregational Disaster Plan included:** Yes\_\_\_\_\_ No\_\_\_\_\_

**All new keys to church buildings included:** Yes\_\_\_\_\_ No new keys\_\_\_\_\_

## **PART 9: PARISHES ONLY**

**Corporate Status in Louisiana current with the Secretary of State,  
and documentation thereof included** Yes\_\_\_\_\_ No\_\_\_\_\_

(This may be found online and printed at  
<https://coraweb.sos.la.gov/CommercialSearch/CommercialSearch.aspx>)

**Changes made in 2023**

**to Articles of Incorporation included**

**Yes** \_\_\_\_\_

**No changes made** \_\_\_\_\_

(Note: Diocesan Canons require permission from the Bishop  
be granted in advance of any changes to Articles of Incorporation)

**Changes made in 2023**

**to By-Laws included**

**Yes** \_\_\_\_\_

**No changes made** \_\_\_\_\_

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Date Completed: \_\_\_\_\_

\_\_\_\_\_  
Rector / Vicar / Chaplain / Priest-in-Charge

\_\_\_\_\_  
Senior Warden

\_\_\_\_\_  
Treasurer

\*\*\*\*\*

*To be completed by the office of the Bishop of Louisiana*

Date Received: \_\_\_\_\_