

EPISCOPAL CHARITIES



“If one tree fruits, they all fruit- there are no soloists. Not one tree in a grove, but the whole grove; not one grove in the forest, but every grove, all across the country and all across the state. The trees act not as individuals, but somehow as a collective. Exactly how they do this, we don't yet know. But what we see is the power of unity. What happens to one happens to us all. We can starve together or feast together. All flourishing... is mutual.”

- Robin Wall Kimmerer

An annual report from

EPISCOPAL CHARITIES

2022

Dear Friends,

If you are receiving this report, it is because you donated to our work in 2022. Thank you very much! I'm delighted that around 200 new persons who joined us for the first time ever at our Fall Gala in October!

In this report, you'll find a description of our grant-making in 2022 and a listing of our Non-Profit Partners, our Parish Partners, and our Strategic Partners. Also - you'll find a description of our Future Capacity Building program for our leaders and words from our 2022 Facilitator as well as 2 CEO participants.

Finally, you'll see our financial statements. We hope that you find our report clear and compelling. Our audited 2022 financials will be available mid-year as soon as the audit is complete. We will place that on our website like last year.

Blessings to you -
Matt Berryman



B O A R D
O F
T R U S T E E S

The Rt. Rev. Paula E. Clark, Chair
David Ortiz, President
Cheryl Rogers, Vice President
Keith Kampert, Jr., Treasurer
The Rev. Dcn. Garth Howe, Secretary
The Rev. Luke Back
Mark Baldwin
Rebecca Cacayuran
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Arlicia Corley
Anne Driscoll
Mauro Hernandez
The Rev. Bradley Linboom
Susan O'Brien
The Rev. Dr. Fulton Porter
Rory Smith
The Rev. Jonathan Thomas
John Tuohy

G R A N T - M A K I N G

As the social outreach arm of the Episcopal Diocese of Chicago for over 60 years, Episcopal Charities provides financial grants to 17 community-based non-profits around Northern Illinois.

Through the **Non-Profit Partner Grants Program**, Episcopal Charities impacts the lives of the most vulnerable with food, shelter, education, mental health care, support for adoptive children and families, hospital chaplaincy, rehabilitation for formerly incarcerated persons, and more with the healing love of God.

In 2021, we began partnering with Episcopal parishes to meet specific needs in their local communities, especially those experiencing hardship as a result of the health and economic crises of 2020 and 2021. With the addition of this new **Parish Partner Grants Program**, Episcopal Charities now impacts more lives in places like Joliet, Woodstock, Flossmoor, and many more.

In 2022, Episcopal Charities launched a third funding stream called the **Strategic Partner Grants Program** to address the institutional and structural causes of systemic racism. In 2022, Episcopal Charities awarded grants to two organizations to support faith-based anti-racist work in Northern Illinois.

NON-PROFIT PARTNERS

\$473,220 disbursed in 2022

METRO INDUSTRIAL AREAS FOUNDATION PARTNERS

Organizing for Justice and Human Flourishing

EAST BLUFF COMMUNITY CENTER, PEORIA

Community Well-Being and Empowerment

SHELTER CARE MINISTRIES, ROCKFORD

Emergency, Transitional and Supportive Housing

ELDERCARE, WAUKEGAN

Ministry with Vulnerable Seniors

WAUKEGAN TO COLLEGE, WAUKEGAN

Tutoring, College Application Help, Mentorship

HOPEFUL BEGINNINGS OF ST. MARY'S , PALATINE

Adoption, Maternity Counseling, Parenting Education

BISHOP ANDERSON HOUSE, CHICAGO

Chaplaincy, Training and Clinical Pastoral Education

CARE FOR FRIENDS, CHICAGO

Community, Food and Wellness for Those Experiencing Homelessness

CATHEDRAL COUNSELING CENTER, CHICAGO

Sliding Scale Mental Health Services

HOLY FAMILY SCHOOL, CHICAGO

Education for Chicago's Under-Resourced Neighborhoods

LAWRENCE HALL, CHICAGO

Transitional Living, Foster Care, Workplace Development

PRIMO CENTER, CHICAGO

Housing and Mental Health Services

RAVENSWOOD COMMUNITY SERVICES, CHICAGO

Meals, Groceries, and Basic Health Services to Neighbors in Need

REVIVE CENTER FOR HOUSING AND HEALING, CHICAGO

Permanent Supporting Housing

ST. AUGUSTINE COLLEGE, CHICAGO

Bilingual, Higher Education

ST. LEONARD'S MINISTRIES, CHICAGO

Interim Housing and Supportive Services for Formerly Incarcerated Men and Women

YOUTH GUIDANCE, CHICAGO

Counseling, Workforce Development, After School Programs



Volunteers at East Bluff Community Center in Peoria



Friends of The Primo Center

PARISH PARTNERS

\$75,300 Disbursed in 2022

GRACE EPISCOPAL CHURCH, NEW LENOX

The Lazarus Ministry is a financial assistance program providing monetary aid to supplement housing or rent, utilities, medical prescriptions, and the like for those at or below the poverty line or in financial crisis.

NUESTRA SENORA DE GUADALUPE EPISCOPAL, WAUKEGAN

The Love Notes Project aims to address the high incidence of pregnancies in young girls within our community. This program will engage five groups of adolescents in a curriculum to develop and maintain healthy relationships within the family, school, friends, and romantically.

ST. ANNE'S EPISCOPAL CHURCH, WOODSTOCK

This project funds a detailed assessment of the social justice and human needs of the people of McHenry County. This assessment will help organize and address needs to provide solutions to vexing community problems.

ST. DAVID'S EPISCOPAL CHURCH, AURORA

Magdalene House Chicago, Inc. and St. David's are partnering to be a provide of hospitality and sanctuary in the western suburbs of Illinois. This grant funds a commercial kitchen that can be used for a cafe and to supply a gift shop.

ST. EDWARD AND CHRIST EPISCOPAL CHURCH, JOLIET

This project maintains and expands the community garden on the Church's grounds, and provides the programming of two food pantry distribution days and a children's event.

ST. JAMES CATHEDRAL, CHICAGO

Meals Among Us is a bagged meals ministry hosted by St. James Cathedral, which partners with LaTanya and the Youth of Englewood (LYE). This grant has helped us to provide 30 meals per week to the youth who spend their afternoons and summers at LYE.

ST. JAMES EPISCOPAL CHURCH, WEST DUNDEE

This program includes a tutoring service for after school and other available times to serve local students impacted or experiencing loss of momentum in basic learning skills. Staffed by professionals, specialists, and trained volunteers, we place particular emphasis on providing tutoring to at-risk students in our area who have been negatively impacted by Covid remote learning or facing other issues which may inhibit basic reading and math achievements.

ST. JOHN THE EVANGELIST EPISCOPAL CHURCH, LOCKPORT

This project provides seasonally-appropriate clothing and hygiene items to people who are living in shelters or on the street, as well as those who have homes but are insecure as to employment and income.

ST. MARK'S EPISCOPAL CHURCH / CREO DUPAGE, GLEN ELLYN

The St Mark's + CREO DuPage partnership expands services provided to Latinx high school students and their families who are interested in pursuing higher education. CREO provides students with academic mentorship and bilingual information for parents. In the previous year as a Parish Partner Grant recipient our program grew from 24 students to 30 high school students.

ST. MARTIN'S EPISCOPAL CHURCH, DES PLAINES

This project is to create a registered Little Free Library located on parish grounds, curated for inclusive children's books as well as inclusive adult spirituality books. We have a special focus on books for/about trans and gender nonconforming kids and families.

ST. PAUL'S EPISCOPAL CHURCH, PEORIA

Springboard kitchen is a commercial commissary kitchen and business incubator that offers a place for small food entrepreneurs to start their business and offers cooking classes for the community where participants can bring home the utensils/appliances used in the classes and sign up to participate in community gardens.

TRINITY EPISCOPAL CHURCH, AURORA

The Sandwich Board provides healthy lunches and personal supplies and clothing each Thursday of the year. Through its volunteers at 8 participating churches, TSB is attempting to provide essentials to a growing client population.

STRATEGIC PARTNER GRANTS

Episcopal Charities' Ministry Partners' work is both created and affected, in part, by the ongoing legacy of racism and continuing impact of white supremacy in America. In alignment with our vision statement, whose hoped-for outcome is a "more just and merciful world," the Allocation Committee of the Board of Trustees, disbursed grants to the following two organizations in 2022:

Anti-Racism Commission of the Diocese of Chicago - \$30,000 Operating Grant

At the National Church's 80th General Convention this past summer, both houses passed and concurred on 36 race-related resolutions. These included Resolution 125 ("Extending and Furthering the Beloved Community") with its intentional focus on creating The Episcopal Coalition for Racial Equity and Justice, and inviting every one of us to a "lifelong vocation of racial justice and equity and the dismantling of white supremacy," and Resolution 127 ("Telling the Truth about The Episcopal Church's History with Indigenous Boarding Schools"), that asks us to acknowledge, engage, and support a complete and comprehensive investigation of the church's complicity in the egregious history of Episcopal-run Indigenous boarding schools.

The Anti-racism Commission has been working for years to "Repair the Breach" by offering Beloved Community Trainings to walk with congregations on their path to racial repentance and reconciliation. In 2013, the Diocese of Chicago's Task Force on the Legacy of Slavery published A Call to Faithfulness: an Invitation to a Committed Journey. Our grant of 30,000 will help further the work of the Anti-Racism commission in our diocese.

Reparations Stakeholder Authority of Evanston - \$20,000 Operating Grant

Five Episcopal churches in the Diocese of Chicago (St. Augustine's, St. Andrew's, St. Luke's, St. Matthew's, and St. Mark's) came together in the summer of 2022 to worship together and to make a groundbreaking collective contribution to the Evanston Reparations Community Fund. This grant will help the 501c3 build a process to address the harm caused by discriminatory practices. When grants from the RSAE commence, they will support Evanston's Black residents by addressing issues such as home retention, education, business development, health, and culture.





STRATEGIC PARTNER REFLECTION

For the past five years, I have been blessed to serve on the Board of Episcopal Charities, working to center the most marginalized and strategically aid them throughout the Diocese. Whenever we gather our Nonprofit and Ministry Partners to talk about the profound challenges they face in their communities, the same themes of racial injustice repeatedly emerge.

The Board of Episcopal Charities has been working together to examine the fault lines that the pandemic exposed, particularly the decades and centuries of injustices that have marginalized our neighbors. We have been listening to those of goodwill who share our values and join us daily in this work. This research, listening, and prayer have led us to recognize that the work of repentance, reconciliation, and repair is essential to the mission of Episcopal Charities.

In 2022, we launched a new initiative to partner with organizations that are repairing the deep roots of racial injustice in our communities. As a trustee, a parishioner, and as a wife and mother, I am heartened to know that the lasting legacy of Episcopal Charities will be working to repair the breach and restore all people to unity with God and to each other in Christ.

-Rebecca Cacayuran, Trustee

INNER CAPACITY BUILDING

Episcopal Charities offers opportunities to support the leaders of our partner organizations through the Inner Capacity Building Program. To deepen the impact of our financial grants, we bring CEO leaders, senior staff, and board members of our partner agencies 2 to 3 times per year for day-long Leadership Cohort Gatherings. We also welcome the leaders of our Parish Partners so that they, too, might benefit from this opportunity to hear from an expert facilitator and build relationships with other colleagues in the Episcopal Charities Ministry Partner family.

Alongside the day-long gatherings, we also offer a CEO bimonthly colleague lunch. Episcopal Charities welcomes our 17 Non-Profit CEOs every other month for lunch and conversation around themes presented at our Cohort gatherings. Often, these conversations are led by an expert facilitator.

While most grant-making is more transactional in nature, we are proud to be in relationship with our partners. Our Inner Capacity Building program is an investment in leaders as people. We recognize that the emotional health and capacity of leaders has a direct impact on the success and culture of an organization.

In 2021 and 2022, Leslie Marquard of Marble Leadership facilitated our Leadership Cohort Gatherings. These days were full of challenge and comfort as she invited us to ask the hard questions about our own emotional and spiritual growth and leaders and the impact that has on the organizations we lead.



Bi-Monthly CEO Luncheon, Leslie Marquard

INNER CAPACITY

BUILDING REFLECTIONS

It's no secret that leaders face more uncertainty, volatility, ambiguity, and complexity than has ever been encountered before. Add in the unrelenting pace of change, and to remain effective, leaders must develop ever increasing capacity at least at this same speed as their circumstances. Without capacity, leaders risk falling behind or even unwittingly damaging those they lead. This is the premise from which Episcopal Charities offered three gatherings to leaders from their grantee non-profit partner organizations. Our joint purpose was to encourage, support and provide a different kind of leadership development that is focused on the leader's inner capacity, rather than a traditional competency-based workshop. In short, we focused on "who the leader is", rather than "what the leader does" because that is where capacity lives.

The approach drew on the leader's emotional, physical and spiritual domains and welcomed radical self-honesty, vulnerability and transparency, while learning among peers wrestling with the same need for capacity building. It required courage for both EC to offer such a program, and from the participants who did not really know in what they would be engaging. For Episcopal Charities to have intentionally invested in the spiritual and emotional capacity of its grantee and partner leaders, they made a rare and giant step toward deepening the impact of their financial grants. Simply stated, healing the world in Christ's name begins at home.

A few of the topics we explored and practiced include:

- *The stages of adult development and how they interact with and map to the stages of spiritual development,*
- *The 11 Reactive Tendencies and 18 Creative Competencies that determine how effective a leader can be, and;*
- *How our "immunity to change" prevents success when we decide to make a change of any kind and how to overcome this built-in immunity.*

Marble Leadership Partners was honored to have been invited to facilitate and teach the three sessions. The participants who gathered are extraordinary people and we are glad that EC thought to engage in their development in a meaningful way. That was a commendable decision to be sure. We are executive coaches and corporate strategists and our co-founders are followers of Jesus. Marble's clients are mainly global leaders, and we have served them for 30+ years. We wish each EC leader an ever-deepening welcome to themselves.

*-Leslie Marquard, PCC
Marble Leadership Partners, Inc.
leslie@marbleleadership.com*



AN EXPLANATORY NOTE ON OUR FINANCES

Episcopal Charities maintains a long-standing investment fund begun many years ago through the faithfulness of Episcopalians in the Diocese of Chicago. Our Board of Trustees carefully oversees the well-being of this fund to ensure long-term growth and sustainability. As the following financials and info-graphics demonstrate, Episcopal Charities receives annual income from two sources to cover program and operating expenses: the gifts of donors and monies drawn from the invested fund.

While our goal is to maintain our annual draw between 5 and 6% percent, dramatic changes in the market greatly affect the percentage. In 2021, the balance of our invested fund was approximately 16 million dollars. Because the balance was high, our percent draw was approximately 3%. However, by the end of 2022, the balance of our fund dropped to 12.7 million dollars – a difference of around 3.3 million – reflecting a downturn in the larger global markets. This drastic reduction increased our percentage draw to approximately 9%. Again, fluctuations in our percent draw aren't caused by major changes in Episcopal Charities' expenses, rather they are caused by market vicissitudes.

On your behalf, we used donations and a draw off of the investment to do ministry with vulnerable individuals and communities across the Diocese:

- In 2022, **we provided \$473,220** of unrestricted grants to our 17 Non-Profit Partners. Episcopal Charities worked in the areas of affordable mental health care; education for marginalized individuals and communities; housing and food insecurity for women, children, and families; rehabilitation of formerly incarcerated individuals; ministries with seniors and shut-ins; care for young mothers through adoption services, and more.
- In 2022, **we provided \$75,300** to support outward-facing initiatives in parishes designed to meet the needs of the most vulnerable in their local communities through our Parish Partner Grants Program.
- In 2022, **we provided \$50,000** to support the Reparations Stakeholder Authority of Evanston and the Anti-Racism Commission of the Diocese of Chicago through our newest program – the Strategic Partner Grants Program.

EPISCOPAL CHARITIES

FINANCIAL PERFORMANCE

FINANCIAL POSITION AT 12/31/22

	2022	2021	2020	2019	2018
TOTAL ASSETS	\$12,714,638	\$16,020,790	\$14,514,429	\$13,266,881	\$12,379,363
TOTAL INVESTMENTS	\$12,126,297	\$15,590,601	\$14,046,683	\$13,094,383	\$12,280,520
DRAW ON INVESTMENTS	\$1,103,120	\$526,696	\$778,588	\$830,095	\$763,000
DRAW AS % OF PORTFOLIO	9.1%	3.4%	5.5%	6.3%	6.2%

STATEMENT OF ACTIVITIES

	2022	2021	2020	2019	2018
INCOME					
FUNDRAISING	\$362,599	\$352,157	\$435,837	\$527,664	\$315,053
BEQUESTS & OTHER	\$80,411	\$397,059	\$304,650	\$8,099	\$32,844
TOTAL	\$443,010	\$749,217	\$740,488	\$535,763	\$347,897
EXPENSES					
COMPENSATION & ADMINISTRATIVE	\$535,485	\$587,329	\$541,429	\$466,480	\$574,599
ALLOCATIONS	\$608,378	\$514,500	\$450,510	\$628,982	\$440,541
FUNDRAISING	\$286,099	\$173,127	\$137,981	\$244,078	\$154,764
TOTAL	\$1,429,961	\$1,274,955	\$1,129,920	\$1,339,540	\$1,169,904
INVESTMENT ACTIVITY					
INTEREST & DIVIDENDS	\$220,656	\$221,978	\$245,568	\$320,276	\$301,859
GAIN (LOSS) ON INVESTMENTS	(\$2,577,704)	\$1,853,213	\$1,343,019	\$1,896,873	(\$1,138,645)
TOTAL	(\$2,357,048)	\$2,075,192	\$1,588,587	\$2,217,149	(\$836,785)
NET SURPLUS/(DEFICIT)	(\$3,343,999)	\$1,549,452	\$1,199,155	\$1,413,372	(\$1,658,792)

WHERE DID OUR MONEY
COME FROM IN 2022?



DRAW ON INVESTMENT: \$1,103,120

GROSS FUNDRAISING: \$362,599

BEQUESTS & OTHER: \$80,162



Cherished guests at the EC Gala

HOW DID WE SPEND OUR
MONEY IN 2022?



ALLOCATIONS TO OUR GRANTEE PARTNERS: \$608,377

GENERAL ADMINISTRATION: \$535,485

FUNDRAISING EXPENSE: \$286,099



Starting the garden at Fields of Friendship



Friends of the Primo Center

HOW DID WE ALLOCATE FUNDS
TO OUR GRANT PROGRAMS?



NONPROFIT PARTNERS: \$473,220

PARISH PARTNERS: \$75,300

STRATEGIC PARTNERS: \$50,000

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EC Gala guests



A WORD ABOUT OUR GALA

In 2022, the Board of Trustees of Episcopal Charities turned the organization's historic Fall Gala into its most inclusive event ever by offering tickets for \$10, \$50, \$100, and the traditional price of \$300.

Our trustees passionately agreed that this gala ought to reflect the full eucharistic feast of God's welcome table where all are included. While raising funds for our mission is critically important, our trustees felt that Episcopal Charities should draw the circle wider, live into the gospel more deeply, and invite many new friends to the gala in hopes that they, too, might join in serving others through our organization. For our first attempt at doing a more inclusive gala, we were delighted with the outcomes:

We sold approximately 420 tickets to the event – nearly 100 more than 2019 when we held our last in-person gala!

Our trustees were delighted with the turn-out of new and old friends at the 2022 gala and feel that our decision to move the event in a more inclusive direction was a very good one – from a values-based perspective and from a strategic perspective. All of us felt that, with our new Bishop present, we offered an evening of joy, celebration, and spirituality to all.

In 2023, we want to hold an event in the Fall that:

Is similarly inclusive, enjoyable, and spiritual, reduces expenses, and increases our total fundraising revenue.

Our Executive Director Matt Berryman, along with EC staff-members, Jonathan Randall Grant and Timothy Beltran del Rio, is planning an event for the Fall of 2023 that we hope will accomplish the three aforementioned objectives.

Thank you to all those who came, who gave of their love and their resources, and to those who were with us for the very first time!



G A L A R E F L E C T I O N

There were smiles, laughter, music and dancing while we celebrated joy that comes from working to make the world a better place. We experienced all of that at the 2022 Annual Episcopal Charities Gala. The room was vibrant with a positive pulse of movement and community. Embracing our commitment to justice, equity, diversity and inclusion we invited all of our donors, workers, volunteers, friends, recipients to join us at a level that was consistent with their ability to contribute. This walk of faith in each other has unexpectedly expanded our network and given us a night of mutual celebration that made us feel whole, together as one. Through the work of Episcopal Charities Chicago and its partner organizations we jointly continue to build the beloved community.

I look forward to seeing you at the Gala next year!

-Rory Smith, Trustee



From left to right: The Rev. Fulton Porter, Trustee, Eva Smith, Rory Smith, Trustee. The Rt. Rev. Paula E. Clark, Bishop of Chicago and chair of EC's Trustees, Wanda Norris, Lisa Porter

WHAT BEING A TRUSTEE HAS MEANT TO ME

I have just completed my second year as a member of the Board of Trustees of Episcopal Charities. This has, hands down, been the most rewarding Board experience I have ever had. I met Executive Director Matt Berryman several years ago. When he followed up with me to inquire if I might consider joining the EC Board, I was in the process of completing my tenure with a Seminary Board and exploring other options where I might serve. I felt God calling me to Episcopal Charities.

From the beginning, I met fellow Board members who are bright, articulate, and deeply spiritual. I feel a kinship with them, some clergy, some lay. As we began to explore topics such as Board Engagement and Development, we recognized that, to fulfill our mission, we wanted to represent the Diocese of Chicago more accurately from a diversity perspective. I was invited to Chair a new committee, the Committee on Trusteeship - to attend to the entire Trustee lifecycle, and to work with Matt and the Board to identify and recruit new members who are both diverse and truly called to the mission of Episcopal Charities. We received advice, however, that an historically white organization like ours also needed to embrace training in the areas of diversity, equity, and inclusion. One year later, I am now a member of a diverse Board that is about to embark on DEI Training together.

The spiritual, stimulating discussions we have at our Board meetings are truly some of the most rewarding, deep, and meaningful conversations of my life. As a Board, we discuss topics that matter – How does EC address causes, not symptoms? How does EC make a real impact with regard to social justice? How does EC play a role in creating Beloved Community? What might a modern EC look like to address 21st century needs?

My relationship with God has deepened because of my friendships with Matt and my fellow Board members. I receive tremendous spiritual energy from them and this work. When we begin our meetings with a time for spiritual reflection, I profoundly feel God's presence. Matt and my EC Board colleagues are "my people." How fortunate I feel to have been called to join this rare community of God's disciples on earth.

- Anne Driscoll, Trustee





Teaching at Primo Center



Friends of the Primo Center



Non-Profit Partner Youth Guidance's "Becoming A Man" mentoring program for students in Chicagoland area



EPISCOPAL CHARITIES
ENVISIONS AN
EPISCOPAL DIOCESE
OF CHICAGO FULL OF
SPIRITUALLY ENRICHED
COMMUNITIES
TRANSFORMING
AND BEING TRANSFORMED,
RESULTING IN A
MORE JUST AND
MERCIFUL WORLD.



Children's area at Primo Center

EPISCOPAL CHARITIES STAFF



Matthew Berryman, *Executive Director*
Jonathan Randall Grant, *Communications Manager*
Timothy Beltran del Rio, *Operations Manager*



PLANNED GIVING

With your support, we can
better plan for the future.

Make a gift to Episcopal Charities so that what has been so important to you in your life - your faith - will be meaningful for Episcopal causes well into the future!

Supporters of EC, from 18 to 98, choose to include us in their will or trust.

For info on how to join them, visit:

episcopalcharities.org/give

or e-mail our executive director at mberryman@episcopalcharities.org



Scan this code with your phone
to be led to our giving portal.