

The Episcopal Church

Reports to the

80th General Convention

Otherwise known as

The Blue Book

Volume 1



Reports of the Committees, Commissions, Agencies, and Boards to
The General Convention of The Episcopal Church
Baltimore, in the State and Diocese of Maryland
July 7th – 14th, 2022

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Office of the General Convention

815 Second Avenue

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Preface
A.D. 2021

A few years ago, a meme appeared showing a neighborhood map with a drawing of a steepled church building labeled, “This is not a church.” Nearby were drawings of streets, shops, hospitals, and houses – each one with the caption, “This is the church.”

If we didn’t already know, the years since the 79th General Convention have certainly surprised us with that insight. When a pandemic causes the cessation of public worship and a severe limitation of traditional sacramental and public ministries of the church, existential questions become as common as musings on the weather.

What is the church when familiar milestones and measures become meaningless? What is the church when people are sick and dying around the world, and social divisions impede healing and comforting the sick and dying? What is the church when racial injustice is exposed at every level and in every structure of society? What is the church when truth becomes as fluid as Pilate’s fateful pondering?

We will continue to answer these questions, but the global crisis caused by the emergence of Covid-19 concentrated our minds.

I will leave historians to evaluate how faithfully The Episcopal Church lived, witnessed, and served during the pandemic, but it does seem clear that we quickly adjusted to emerging realities. We found ways to feed the hungry – physically and metaphorically – and learned that a mask could reveal our care rather than conceal it. We may have baptized technology some years ago, but the pandemic confirmed it as worship, education, and ministry found unexpected pathways on the internet. We kept hope alive in a thousand and one ways, as we encountered and accompanied the Living Christ along trails we were discovering.

We also adapted to ensure the quotidian tasks of the General Convention continued: work, research, mission, study, and action mandated for our interim bodies were creatively accomplished. The findings and recommendations of that ministry will be found in the

virtual pages of this *Blue Book*. I give thanks for every faithful Episcopalian who began the triennium with a roadmap to accomplishing our goals, and are finishing the quadrennium with the facility of experienced cartographers.

As you read of their work, I hope you will join me in thanking them for their creativity and achievement. To paraphrase the words of Miranda, “How much good is here; how beautiful humankind can be. O brave new world that has such people in it!”

A handwritten signature in black ink that reads "Michael Barlowe". The signature is written in a cursive style with a long, sweeping underline.

The Rev. Canon Michael Barlowe, D.D.
Secretary of the General Convention and Executive Officer

Acknowledgements

Although preparation for the triennial gathering of the Church at General Convention is but a part of the work of the extraordinary people in the Executive Office of the General Convention (GCO), the changed work conditions necessitated by the Covid-19 pandemic posed unique challenges and difficulties. Superintending the many puzzle-pieces, parts, and processes that come together to support the Church's collective decision-making, while working remotely on newly-available platforms, has raised the odds. But throughout it all, the GCO has persevered with software testing, survey development, *Blue Book* preparations and editing, contract negotiations and renegotiations, hotel and volunteer coordination, a summer of online elections, and hundreds of other activities that come together to prepare The Episcopal Church for gathering in General Convention.

Therefore, I hope you will join me in thanking the amazing staff of the General Convention:

- Betsey Bell, *Executive Assistant to the Executive Officer (tenure began 2020)*
- Marian Conboy, *Executive Assistant/Deputy for Legislation (retired 2020)*
- Iris DiLeonardo, *Data Specialist and Meetings Assistant*
- Jennifer Gonzalez, *Administrative Assistant*
- Patrick Haizel, *Deputy for Administration and Operations*
- Molly James, *Deputy Executive Officer*
- Brian Murray, *Governance Technology Specialist*
- Fiona Nieman, *Deputy for Convention and Meeting Planning*
- Twila Rios, *Manager of Digital Information Systems*
- Carrie Surbaugh, *Digital Editing and Publications (until 2021)*
- Brendon Hunter, *Digital Editing and Publications (began 2021)*
- David Michaud, *Consultant*

Lori Ionnitui, for many years the General Convention Manager, left the GCO in 2018 and we thank her for her long service to The Episcopal Church.

Mark Duffy and the staff and board of the Archives support the General Convention, its officers, and its many activities and their excellent work is most appreciated.

Finally, to the Presiding Bishop and the President of the House of Deputies; to the members of the Executive Council and the Interim Bodies of the General Convention; and to other staff of The Episcopal Church: thank you for your faithfulness and commitment to the ministries of the General Convention. May the blessings of God's mission continue to inspire.

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EXECUTIVE COUNCIL REPORT

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- Executive Council Committee on HBCU
- United Thank Offering Board
- Anglican-Roman Catholic Dialogue in the USA
- Moravian Episcopal Coordinating Committee
- Presbyterian Episcopal Dialogue Committee
- United Methodist Episcopal Committee

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EXECUTIVE COUNCIL

Membership

The Most Rev. Michael Curry, <i>Chair, Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Vice-Chair, Ex Officio</i>	Ohio, V	
The Rev. Canon Dr. Michael Barlowe, <i>Secretary, Ex Officio</i>	California, VIII	
Mr. N. Kurt Barnes, <i>Treasurer, Ex Officio</i>	New York, II	
Mr. Thomas Alexander	Arkansas, VII	2021
The Rt. Rev. Lloyd Allen	Honduras, IX	2021
The Rev. Devon Anderson	Minnesota, VI	2024
Dr. Liza Anderson	Minnesota, VI	2024
Ms. Julia Ayala Harris	Oklahoma, VII	2021
Ms. Diane Butler	Rio Grande, VII	2021
Ms. Jane Cislucycis	Northern Michigan, V	2021
The Rev. Matthew Cowden	Northern Indiana, V	2024
The Rev. Lillian Davis-Wilson	Western New York, II	2024
The Rev. Patty Downing	Delaware, III	2024
Canon Noreen Duncan	New Jersey, II	2021
The Rev. Canon Cornelia Eaton	Navajoland Area Mission, VIII	2024
Ms. Blanca Echeverry	Colombia, IX	2024
Ms. Alice Freeman	North Carolina, IV	2024
Ms. Pauline Getz	San Diego, VIII	2024
Mr. Louis Glosson	San Diego, VIII	2021
Ms. Mayra Liseth Gonzales Polanco	Honduras, IX	2021
The Rev. Angela Goodhouse-Mauai	North Dakota, VI	2024
The Very Rev. Mark Goodman	Rio Grande, VII	2024
The Rev. Charles Graves	Texas, VII	2021
The Rt. Rev. Scott Hayashi	Utah, VIII	2024
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2024
The Rev. Anne E. Kitch	Newark, II	2024
The Rt. Rev. Dr. Edward Konieczny	Oklahoma, VII	2021
Ms. Alexizendria Link	Western Massachusetts, I	2021
The Rev. Mally Ewing Lloyd	Massachusetts, I	2021
Mrs. Andrea McKellar	South Carolina, IV	2024
Canon Dr. Steven Nishibayashi	Los Angeles, VIII	2021
The Rev. Dr. Steven Pankey	Kentucky, IV	2021
The Ven. Aaron Perkins	Maine, I	2024
Ms. Diane Pollard	New York, II	2024
Ms. Holli Powell Sturm	Lexington, IV	2021
Mr. Russell Randle	Virginia, III	2021

The Hon. Rose H. Sconiers	Western New York, II	2024
The Rt. Rev. Dabney Smith	Southwest Florida, IV	2021
The Rev. Geoffrey Smith	New Hampshire, I	2021
Ms. Sarah Stonesifer Boylan	Washington, III	2024
Mr. George Wing	Colorado, VI	2021
Mr. Warren Wong	California, VIII	2021

Others with Seat and Voice

The Hon. Byron Rushing	Vice President of the House of Deputies
The Rev. Geoffrey Smith	Chief Operating Officer, DFMS
Mr. Kent Anker	Chief Legal Officer, DFMS (as of 12/2020 or 1/2021)
The Rt. Rev. Andrew Asbil	Anglican Church of Canada Partner 8/2019
The Rev. Joanne Engquist	Evangelical Lutheran Church in America Partner, 9/2019

Changes in Membership

The Rev. Charles Graves was elected in October 2019 after the Rev. Jabrial Ballentine resigned in May of 2019. The Rev. Dr. Steven Pankey was elected in February of 2020 after the Rev. Canon Frank Logue resigned in February of 2020.

In addition, the Rev. David Burrows term ended as the Anglican Church of Canada Partner in December of 2018. He was replaced by the Rt. Rev. Andrew Asbil in August of 2019. The Rev. Will Voss's term as the Evangelical Lutheran Church in America Partner ended in August of 2019. He was replaced by the Rev. Joanne Engquist in September of 2019.

Mandate

CANON I.4.1

CANON 4: Of the Executive Council Sec. 1

(a) There shall be an Executive Council of the General Convention (which Council shall generally be called simply the Executive Council, or the Council) whose duty it shall be to oversee the execution of the program and policies adopted by the General Convention. The Executive Council shall have oversight of the work done by the Domestic and Foreign Missionary Society in its capacity as its Board of Directors. The Council shall have oversight responsibility for the disposition of the funds and other property of the Domestic and Foreign Missionary Society in accordance with the provisions of this Canon and the resolutions, orders, and budgets adopted or approved by the General Convention. The Executive Council shall also have oversight responsibility for the work of the Office of General Convention and the Executive Officer of General Convention who shall report directly to the Executive Council. It shall also have oversight responsibility for the disposition of the moneys of the Office of General Convention. The Council shall adopt procedures it deems appropriate for approval of expenditures by the Domestic and Foreign Missionary Society and the Office of General Convention.

(b) The Executive Council shall be accountable to the General Convention and shall render a full, published report concerning the work of the bodies for which it has oversight responsibility to each meeting of the General Convention. The report shall include information on the implementation of all resolutions adopted in the previous General Convention calling for action by the Executive Council, the Domestic and Foreign Missionary Society, and the Office of General Convention.

(c) The Council shall exercise the powers conferred upon it by Canon, and such further powers as may be designated by the General Convention, and between sessions of the General Convention may initiate and develop such new work as it may deem necessary. Subject to the provisions of these Canons, it may enact By-laws for its own government and enact procedures for its own committees.

(d) The Executive Council shall be composed (a) of 20 members elected by the General Convention, of whom four shall be Bishops, four shall be Presbyters or Deacons, and 12 shall be Lay Persons who are confirmed adult communicants in good standing (two Bishops, two Presbyters or Deacons, and six Lay Persons to be elected by each subsequent regular meeting of the General Convention); (b) of 18 members elected by the Provincial Synods; (c) of the following *ex officio* members: the Presiding Bishop and the President of the House of Deputies; and (d) the Chief Operating Officer, the Secretary, the Treasurer of the General Convention, the Chief Financial Officer of the Domestic and Foreign Missionary Society, and the Chief Legal Officer of the Executive Council, all of whom shall have seat and voice but no vote. Each Province shall be entitled to be represented by one Bishop or Presbyter or Deacon canonically resident in a Diocese which is a constituent member of the Province and one Lay Person who is a confirmed adult communicant in good standing of a Diocese which is a constituent member of the Province, and the terms of the representatives of each Province shall be so rotated that two persons shall not be simultaneously elected for equal terms.

(e) The Executive Council shall appoint a committee from among its members to assist the Council to advise the Joint Standing Committee on Nominations and the Provincial Councils on what skills, gifts and experience are needed on the Executive Council to enable it to function with maximum effectiveness, and whether those skills are at that time represented on the Executive Council, and (ii) create a description of the skills, gifts and experience requisite for service on the Executive Council, including the value of cultural and geographic diversity on the Council and the value of including historically underrepresented voices in the governance of the Church.

(f) Of the Executive Council members elected by the General Convention, the Bishops shall be elected by the House of Bishops subject to confirmation by the House of Deputies, and the Presbyters or Deacons and Lay Persons shall be elected by the House of Deputies subject to confirmation by the House of Bishops.

(g) Except in the case of members initially elected for shorter terms in order to achieve rotation of terms, the terms of office of the members of the Council (other than *ex officio* members) shall be equal to twice the interval between regular meetings of the General Convention. The terms of office of all members shall commence immediately upon the adjournment of the General Convention at which they were elected or, in the case of election by a Synod, upon the adjournment of the first regular meeting of General Convention following such election. The term of a member shall become vacant in the event of two absences from meetings of the Council in the interval between successive regular meetings of the General Convention unless excused by the Chair or Vice Chair for good cause. Members shall remain in office until their successors are elected and qualified. No person who has served at least three consecutive years on the Executive Council shall be eligible for immediate re-

election for a term of more than three years. After any person shall have served six consecutive years on the Executive Council, a period of three years shall elapse before such person shall be eligible for re-election to the Council.

(h) Should any vacancy occur in the Council through death, resignation, disability, or other reason, with respect to a member elected by the General Convention, the Council shall fill such vacancy by the election of a suitable person to serve until a successor is elected by the General Convention.

(i) Should any vacancy occur in the Council through the failure of any Provincial Synod to elect a member, or through the death, resignation, or removal from the Province of any such member, the Provincial Council of the Province shall appoint a suitable person to serve until the Provincial Synod shall by election fill the vacancy.

Summary of Work

This was a triennium like no other for the Executive Council. Under the leadership of The Most Rev. Michael Bruce Curry and The Rev. Gay Clark Jennings, the Executive Council began their first meeting with an overview of the role of the Executive Council and an explanation of the committee structure. For the first five meetings, worship was planned and coordinated by The Rev. Canon Frank Logue. Upon his election as bishop and resignation from Executive Council, worship was coordinated by The Rev. Devon Anderson, assisted by Mr. Thomas Alexander. The Rev. Kurt Wiesner was appointed chaplain.

The Executive Council committed to spending time at each meeting on board development focused on implicit bias and inclusion. A highlight was the October, 2019 meeting in Montgomery, Alabama which included a pilgrimage to the Legacy Museum and the National Memorial for Peace and Justice. The last in-person meeting was in February, 2020. After that, due to the pandemic, all meetings were virtual. In response to unprecedented circumstances, the Executive Council held many more meetings than usual. Special meetings were held in April, May, July and November of 2020 in addition to regularly scheduled meetings. The Executive Council approved a budget of \$100,000 for Becoming Beloved Community Rapid Response Grants, authorizing a special grant cycle to address systemic racism and the racial disparities of the pandemic evidenced by the disproportionately affected people of color.

Upon the recommendation of the Presiding Officers, the Executive Council also voted to postpone the General Convention to July, 2022, for the health and safety of the participants.

To address their work more effectively, the Executive Council voted to change their structure to four Joint Standing Committees – Finance, Governance and Operations, Mission Within The Episcopal Church, and Mission Beyond The Episcopal Church. Reports of the Joint Standing Committees follow here.

Proposed resolutions

A049 Host and conduct a second Building Beloved Community Conference by or before 2024

Resolved, the House of ___ concurring, That the General Convention shall promote the gathering of leaders who are engaged in the work of racial reconciliation and racial justice throughout the Episcopal Church for the purposes of developing skills among leaders, growing a network of healers, justice makers, and reconcilers and igniting the church to live boldly into the Jesus Way of Beloved Community; and be it further

Resolved, That the Presiding Officers' Advisory Group on Beloved Community Implementation host a second Building Beloved Community Conference by or before July 2024. This gathering would accelerate the work of racial reconciliation by sharing stories, best practices, resources, and identifying needed action in each of the four areas of becoming Beloved Community; and be it further

Resolved, that the Domestic and Foreign Missionary Society allocate up to \$50,000 to fund this work for the implementation of this resolution, especially to ensure participation in the Summit by the widest representation of all God's People.

EXPLANATION

Hebrews 10:24-25 “24 And let us consider how to provoke one another to love and good deeds, 25 not neglecting to meet together, as is the habit of some, but encouraging one another, and all the more as you see the Day approaching.”

The Presiding Officers' Advisory Group on Beloved Community Implementation scheduled the first Building Beloved Community Conference in Minneapolis, May 5-7, 2020, which had to be canceled due to COVID-19 concerns about large groups congregating. Instead, the POAG held the Beloved Community Conference by Zoom on July 28 – 30, 2020. The conference discussion followed three (3) tracks: Day 1 – Truth, Day 2 – Reconciliation, Day 3 – Healing, and conference registration and attendance far exceeded the expectations of the committee. Undoubtedly, the ability to attend the conference by Zoom increased attendance; yet, such massive registration and attendance numbers indicate the need for continuing these conversations.

A050 Support collaborative efforts with Equal Justice Initiative (EJI) to place historical markers

Resolved, the House of ___ concurring, That this 80th General Convention of The Episcopal Church (“TEC”) hereby encourage participation in the Equal Justice Initiative (“EJI”) efforts to place Historical Markers at key sites throughout the United States (U.S.) that honor the lives and work of persons of color who suffered or were killed due to the historical effects of White Supremacy; and be it further

Resolved, That each province, diocese, parish, and institution conduct research and collaborate with the EJI in these efforts to place Historical Markers. TEC may, as its schedule, programming and budget and human resources permit, initiate its own efforts to place Historical Markers at key sites where People of Color, particularly Indigenous people and people of the African Diaspora, suffered or were martyred due to the historical effects of White supremacy; and be it further

Resolved, That the sum of \$25,000 be set aside for carrying out this work, to include costs per marker, cost of conducting research, cost of consulting experts, cost of paying stipends to interns, and cost of promoting and hosting the Marker Installation event.

EXPLANATION

Joshua 4:4-7 “So Joshua called the twelve men whom he had appointed from the sons of Israel, one man from each tribe; and Joshua said to them, “Cross again to the ark of the Lord your God into the middle of the Jordan, and each of you take up a stone on his shoulder, according to the number of the tribes of the sons of Israel. Let this be a sign among you, so that when your children ask later, saying, ‘What do these stones mean to you?’

Then you shall say to them, ‘Because the waters of the Jordan were cut off before the ark of the covenant of the Lord; when it crossed the Jordan, the waters of the Jordan were cut off.’ So these stones shall become a memorial to the sons of Israel forever.”

As early as 1619, and perhaps before, Africans were brought to the U.S. to work as slaves, which was an occupation which wrought great suffering on the enslaved and frequently resulted in brutal and/ or untimely death. Further, due to the Doctrine of Discovery, European immigrants to the U.S pursuing a principle of White superiority persecuted, displaced, and killed Indigenous people in order to claim their land and convert it to the use of Europeans. Much of this brutal and genocidal history has remained hidden, and the majority of Africans and Indigenous who struggled, suffered, and died in these ways have never been recognized or honored. Supporting the EJI effort to place these Historical Markers, or choosing to place such markers on its own, would cause TEC to live into its covenants to “seek and serve Christ in all people” and to “strive for justice and peace among all people respect the dignity of every human being.”

A051 Improve recruitment, hiring, appointment, retention and representation of People of Color within The Episcopal Church

Resolved, the House of _____ concurring, That this 80th General Convention of The Episcopal Church (“TEC”) hereby commit to developing greater representation and retention of People of Color in all church positions; and be it further

Resolved, That TEC staff, in partnership with the Executive Council Committee on Anti-Racism & Reconciliation and others, be asked to complete the development and dissemination of a set of guidelines and best practices for recruitment, hiring, appointment, retention, and representation of People of Color in hired and appointed church positions; and be it further

Resolved, That all parishes, dioceses, and institutions will be encouraged to follow these guidelines and best practices reporting the results of their efforts through the annual parochial report.

EXPLANATION

Recent research into the membership of the church has confirmed that there is a significant percentage of our membership who are People of Color. Yet People of Color are not equitably represented in the governance and operations of the church. In the Sermon on the Mount Jesus gives us what is commonly known as The Golden Rule “Do unto others as you would have them do unto you.” This is repeated in both Matthew 7:12 and Luke 6:31. Yet as a church, how can we do this if we as a church do not have appropriate visibility and representation in the leadership and operations of the church that would lead us to an understanding of ourselves?

While there is a desire to rectify this situation and have equitable representation of People of Color, research also indicates that many members involved in calling or hiring for church positions do not know how to reach People of Color or truly engage them in candidacy for positions.

This resolution will provide guidance necessary to help increase the numbers of People of Color toward a more appropriate representation in the church. It should also lead to more involvement and more membership of People of Color in the church.

A052 Revise the Mandate of the Executive Council Committee on Anti-Racism and Reconciliation

Resolved, the House of ____ concurring, That the mandate for the Executive Council Committee on Anti-Racism & Reconciliation is hereby clarified as follows:

“This Committee is charged with supporting and monitoring the Church’s work in response to General Convention resolutions directed at dismantling racism and promoting racial healing, justice, and reconciliation in the Church by:

- a) helping the church recognize and develop its work of racial healing, justice, and reconciliation as a fundamental and requisite part of Christian formation;
- b) supporting the work of Becoming Beloved Community: The Episcopal Church’s Long-Term Commitment to Racial Healing, Justice, and Reconciliation and other such initiatives the Presiding Officers, Executive Council, or Interim Bodies develop;
- c) recommending, in collaboration with staff and other church organizations, resources and best practices for dismantling racism and for promoting racial healing, justice, and reconciliation that can be adapted to different contexts;
- d) collecting information from dioceses and provinces about their successes and challenges in complying with the canonical requirements and with General Convention Resolution 2018-A045 for providing anti-racism training;
- e) and sharing their findings with Executive Council on an annual basis.

Membership of the Executive Council Committee on Anti-Racism & Reconciliation shall be composed of:

one person named by the governing body of each province of this Church who has been trained in doing the work of dismantling racism and seeking to foster racial healing, justice, and reconciliation, has demonstrated experience in anti-racism/racial reconciliation work, has demonstrated the ability to make connections with people in their geographic area who do this work, and has demonstrated a commitment to make connections with people in the provinces who do this work;

one member of the Executive Council as appointed by the Chair and Vice-Chair of Executive Council;

one Bishop as appointed by the Presiding Officers;

members named who are from the racial or ethnic groups of black, Latino/a, Asian, Native American/Indigenous, and non-Hispanic white to ensure representation of diverse racial and ethnic voices on this Committee - if there are none, then the Chair and Vice-Chair of Executive Council shall appoint a member at large from each unrepresented racial or ethnic group;

a member named who is under 40, to ensure representation of multiple generations - if there are no members then the Chair and Vice-Chair of Executive Council shall appoint a member at large from each unrepresented generational group.

Members shall serve terms as follows:

Each Committee member shall serve one triennium beginning January 1 in the year following each General Convention until the December 31 following the next General Convention.

Members may be named to serve consecutive terms by their provinces.

In the event that a province fails to name a person to serve on the Committee by [sic] January 1, when each term begins, the Chair and Vice-Chair of Executive Council shall appoint a qualified person from that province to serve on the Committee.

Vacancies shall be filled in the same manner as the original members were named. Vacancies in excess of 30 days shall be filled by the Chair and Vice-Chair of Executive Council, and in the case of a Bishop vacancy, by the Chair of Executive Council.”

EXPLANATION

The proposed resolution combines and eliminates conflict in the following resolutions:

2018-A043 Clarify and Update Mandate 2018-A044 Establishing an Anti-Racism/Racial Reconciliation Certification Framework: Building Capacity for Becoming Beloved Community
2018-A045 Revision and Reminder of Anti-Racism Training Requirement
2018-B004 Encouraging the Language of Dismantling Racism and Racial Healing, Justice, and Reconciliation

The changes are:

Replacing “eliminating the sin of racism” with “dismantling racism and racial healing, justice and reconciliation” as per resolution 2018-B004.

Replacing “recognizing and developing” with “helping the church recognize and develop” as it makes no sense to state that the committee needs to recognize that its work is fundamental. The greater church needs to recognize this.

Also, the grammar is odd in that the main paragraph ends with “the Church by...” indicating what follows is work it is doing – not that the committee should recognize that what it is doing is fundamental.

This change removes the restriction of the Committee to working only on the Becoming Beloved Community initiative.

This change removes mention of specific entities that may be obsolete over time. Removing them allows such changes to happen in organizational structure without having to change the mandate or have it cause confusion.

This change incorporates language from resolutions 2018-A044, 2018-A045, and 2018-B004 recognizing that resolution 2009-B049 has now expired.

This change provides guidelines for Committee membership. The most recent mandate for the Committee (GC 2018-A043) contains no membership guidelines. Experience has shown that the Committee, as do all groups, operates better when there is diversity. Also, as this Committee's purpose is to address racism, it is imperative that the Committee have representation from different races to truly know the experience of those races and gain insights into the ways that racial justice and healing can be achieved.

A053 Ensure the vital role of the Episcopal HBCUs in building The Beloved Community

Resolved, the House of _____ concurring, That the General Convention call upon dioceses, parishes and Episcopalians to marshal support for Saint Augustine's University and Voorhees College to ensure their continuing success.

EXPLANATION

The Beloved Community in the Episcopal Church has educational deep roots:

- In 1865, General Convention established a Freedman's Commission as an agency for the evangelization and education of former slaves;
- In 1868, St. Augustine's Normal School in Raleigh, NC, was founded following the call of twelve priests who travelled from North to South for that purpose;
- In 1883, in Lawrenceville, Virginia, the son of a former slave, James Solomon Russell, a newly ordained priest, started a Normal School for former slaves that became St. Paul's College, which closed in 2012;
- In 1893, Elizabeth Evelyn Wright, trained by Booker T. Washington at Tuskegee, opened a Normal School in Denmark, South Carolina that became Voorhees College.

The powerful Beloved Community legacy continues today through the mission of our two surviving Episcopal HBCUs. We recognize that the harvest is plentiful, but the laborers are few in this vulnerable ministry. By the nature of their service to a vulnerable, underserved population, our Episcopal HBCUs need ongoing external support that far exceeds what the church can appropriate. It is crucial to continue raising awareness of their distinctive mission and to challenge Episcopalians to provide needed support for their continuance.

A054 Create a Task Force on Senior Wellness and Positive Aging

Resolved, the House of _____ concurring, That the 80th General Convention authorize the creation of a Task Force on Senior Wellness and Positive Aging, among its goals to:

- Identify the major challenges to positive aging;
- Communicate with congregations, dioceses, and provinces to collect information about their approaches to these challenges;
- Explore networks in which the Task Force can be a meaningful partner;
- Coordinate with the Presiding Bishop's staff to ascertain facets of their ministries in which the Task Force might have a useful role to play;
- Review existing General Convention policy on aging and senior wellness to identify gaps and opportunities and consult with the Office of Government Relations to identify areas where political advocacy could be useful. Consider developing resolutions for Executive Council and General Convention that identify advocacy priorities for positive aging and senior wellness.
- Initiate conversation with leading non-profit senior care providers and advocates, particularly those affiliated with The Episcopal Church;

And be it further

Resolved, That the Task Force will produce a resource of best practices for congregations, dioceses and provinces to support their ministries to persons in the second half of life as they strive to participate meaningfully and creatively in life-long learning and to engage constructively in the communities in which they live; and be it further

Resolved, That this Task Force will report annually to The Executive Council and to the 81st General Convention; and be it further

Resolved, That this task force be appointed jointly by the Presiding Officers, with between 10 and 14 members, two to four of whom shall be bishops, two to four of whom shall be clergy, and not more than six lay persons, with the members having some professional, pastoral or medical background in senior care and wellness; and be it further

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$30,000 for the implementation of this resolution.

EXPLANATION

In the midst of an enormous demographic shift in the number of people over 65 in the United States and the devastating impact of the COVID-19 pandemic on this segment of the population, our Baptismal Covenant's call to "strive for justice and peace among all people and respect the dignity of every human being" must be an urgent incentive to be a catalyst for dialogue, analysis, and change in the way society nurtures its older members.

There are daunting challenges that accompany the demographic shift that is taking place in the United States population, as well as that of most other developed countries, as the number of

adults over 65 years of age nearly doubles by the year 2050 (increasing from 43.1 million in 2012 to 83.7 million in 2050). All segments of the senior care system will be put under great stress as people in this demographic wave seek ways to age positively and ensure ongoing wellness.

We have witnessed the devastating impact that the COVID-19 pandemic has had on older individuals, exposing the vulnerability of those over 65 by highlighting questions surrounding long-term care communities, hospital preparedness, supply chains for critical medical equipment, the psychological and physical effects of isolation, and coordinated governmental response, as well as a host of other issues bearing upon senior wellness. Some 80% of COVID-19 deaths have been in people over 65 years old. Approximately 7% of all cases, and 40% of all deaths have been related to long-term care facilities, nursing homes particularly.

Faith communities have a vital role to play in being a powerful advocate for a holistic approach to senior wellness and positive aging, calling for the inclusion of spiritual, cultural, mental, intellectual, and social wellness alongside physical care. The Episcopal Church has taken an active role in older adult ministries historically. The Episcopal Society for Ministry to the Aging (ESMA) was active from 1970 to 2003. A Task Force on Older Adult Ministries was authorized in 2009, re-authorized in 2012, its work curtailed in 2015. This is an important time for The Episcopal Church to reengage in this vital area of ministry.

A055 Receive and Study Proposal of Ecumenical Dialogue with Presbyterians (PCUSA)

Resolved, the House of ____ concurring, That this 80th General Convention receives with gratitude the proposal “Episcopal- Presbyterian Agreement on Local Sharing of Ministries,” which was prepared and distributed by The Episcopal Church-Presbyterian Dialogue; and be it further

Resolved, That this Convention encourages all Episcopalians to utilize the many resources available to understand the work of the Dialogue and this proposed Agreement to assist dioceses and local congregations in the interim sharing of ministers. Resources can be found on the websites of The Episcopal Church (episcopalchurch.org), the Episcopal Diocesan Ecumenical and Interreligious Officers (edeio.org), and [PCUSA Website: <https://oga.pcusa.org/section/committees/gaceir/>]; and be it further

Resolved, That this Convention encourages and supports prayerful consideration by all Episcopalians during the coming triennium of this significant step forward in response to our Lord’s fervent wish “that all may be one” (John 17:21).

EXPLANATION

Please refer to the report to the 80th General Convention of the Presbyterian Episcopal Dialogue Committee (otherwise known as a “blue book” report) for the full document "Episcopal- Presbyterian Agreement on Local Sharing of Ministries" which has a full explanation and background. The reports to the 80th General Convention can be found on the General Convention website at <https://www.generalconvention.org/bluebook2021>.

EXECUTIVE COUNCIL REPORTS

Subcommittee Reports

Executive Council Joint Standing Committee on Governance and Operations

Executive Council Joint Standing Committee on Mission Beyond The Episcopal Church

Executive Council Joint Standing Committee on Mission Within The Episcopal Church

Executive Council Joint Standing Committee on Finance

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON GOVERNANCE AND OPERATIONS

Membership

Ms. Jane Cislucis, <i>Chair</i>	Northern Michigan, V	2021
Mr. Russell Randle, <i>Vice-Chair</i>	Virginia, III	2021
Dr. Liza Anderson, <i>Secretary</i>	Minnesota, VI	2021
Mr. Thomas Alexander	Arkansas, VII	2021
Ms. Diane Butler	Rio Grande, VII	2021
Ms. Pauline Getz	San Diego, VIII	2021
Mr. Louis Glosson	San Diego, VIII	2021
The Rt. Rev. Dr. Edward Konieczny	Oklahoma, VII	2021
The Ven. Aaron Perkins	Maine, I	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

Board governance and board development. Legal services, litigation and other legal matters. Copyright, trademark and intellectual property matters. Human Resources: approval of policies & Employee Handbook; compensation of officers; ministry review with Officers. Communications: branding; public relations & corporate image; website and other media. Information Technology. Physical plant, facilities, construction, leases, and policies. Archives. Parochial Report. per Canon I.6.1

Summary of Work

The Joint Standing Committee on Governance and Operations met during all regular meetings of the Executive Council, as well as several electronic meetings throughout the triennium.

Throughout the triennium, we undertook significant work to improve the Executive Council's cohesion as a board, both through ongoing board development and through amendments to our bylaws to facilitate more work being done electronically in between regular meetings.

As a result of the shift to online meetings as a result of the coronavirus pandemic, we found that greater intentionality and planning was required to make sure that all members of the Executive Council were able to fully participate in meetings. Because informal conversations and relationship building are less likely to happen naturally in a virtual environment, we have found that it requires greater intentionality to facilitate relationships and to make sure that all voices are being heard.

We hope that as the work of the Executive Council goes forward, members will continue to feel more empowered to take proactive leadership and initiative, not merely responding to work that is given to us, but being forward thinking and visionary about the long range issues facing the church.

Board Governance and Board Development

Dismantling Racism

As part of board development, members of Governance and Operations planned sessions on dismantling racism at each regular meeting of the Executive Council. These included a workshop on implicit bias training, a pilgrimage to the National Memorial for Peace and Justice in Montgomery, Alabama, education about the Doctrine of Discovery and its impact on indigenous communities, and a pilgrimage to the Oklahoma City National Memorial and Museum. We have a commitment to furthering this important ongoing work as a Council as we seek to recognize and to dismantle racism in all its forms.

Response to 2018-D059: Evaluate Meeting Policies and Practices on Alcohol Misuse

General Convention 2018 called for the Executive Council “to evaluate the policies and practices of its meetings and the meetings of its commissions, committees, and boards to make necessary changes that may contribute to a healthy environment with regard to alcohol and substance misuse and other forms of addiction.” Governance and Operations member Thomas Alexander chaired a subcommittee that developed a program around this theme for our October 2020 meeting. We see this as the first step in an ongoing culture shift, especially once meetings return to an in-person format, as we seek to create an environment that is safe, welcoming, and inclusive of all people.

Executive Council Operations

We drafted several revisions to the Executive Council bylaws, which were passed in October 2020. These revisions permit more work to be done electronically, whether between regular meetings or if circumstances such as quarantine, natural disaster, or visa restrictions preclude a member’s attendance at a meeting. They also require resolutions to be posted well in advance to allow sufficient time for all materials to be translated into Spanish. By doing more of our work in advance

of each meeting, we hope to be able to use our time together for deeper discussion and discernment, as well as longer range visioning.

Episcopal Church Center Operations and Human Resources

We heard reports from the Chief Operating Officer at each regular meeting of the Executive Council, with particular attention to the work of the communications team. This included extensive discussions about the translation needs and priorities of the church. We foresee ongoing work in discerning what the church's priorities are for translation, including determining what constitutes an official document that requires translation, and what other criteria should inform our translation priorities.

We also received regular updates on the physical plant at 815 Second Avenue and on work to migrate to a new computer server.

A subcommittee has been working to revise the section of the employee handbook on works for hire. We also approved a temporary new sick leave policy in response to the coronavirus pandemic.

Legal Services

We received updates on the Episcopal Church's legal work at each regular meeting of the Executive Council.

A subcommittee drafted a job description for the position of Chief Legal Officer, and Kent K. Anker was named to the position in November 2020.

Archives of the Episcopal Church

The Committee had extensive discussions about the need to identify an interim location for the Episcopal Church's archives. An appropriate facility in Austin, TX was identified and approved.

As directed by 2018-A088, a policy drafted by the archives for amending church records to reflect name and gender changes was reviewed and approved.

Governance

A number of disparate matters related to the church's governance were attended to throughout the triennium. These included the following: formally approving the admission of the Episcopal Church in

Cuba as a diocese of the Episcopal Church, approving the 2020 Parochial Report, which included special questions related to the Covid-19 pandemic and dismantling racism, establishing a process for background checks for provincial nominees to Executive Council, reviewing the Executive Council job description, approving Louisville, KY as the site of the 2024 General Convention, reviewing reports submitted by the provinces of the Episcopal Church, and approving a process for populating the Provincial Court of Review.

We received a report from the Church Pension Fund in its role as recorder of ordinations about their plan to collect data on clergy compensation by race and gender, as requested by General Convention 2018. We also received regular updates from the Task Force to Develop Churchwide Family Leave Policies.

We received the report from the Task Force on the Church Pension Fund, which was directed by General Convention to study “the historical and current relationship of The Episcopal Church and The Church Pension Fund in order to achieve greater clarity on their respective roles, responsibilities and authority.” We anticipate further conversation about the report in 2021.

We also met regularly with representatives from the Joint Standing Committee on Finance to discuss the items within the budget that fell under our purview.

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON MISSION BEYOND THE EPISCOPAL CHURCH

Membership

The Rt. Rev. Dabney Smith, <i>Chair</i>	Southwest Florida, IV	2021
The Rev. Lillian Davis-Wilson, <i>Vice-Chair</i>	Western New York, II	2021
The Rev. Matthew Cowden, <i>Secretary</i>	Northern Indiana, V	2021
Ms. Blanca Echeverry	Colombia, IX	2021
Ms. Alice Freeman	North Carolina, IV	2021
Ms. Mayra Liseth Gonzales Polanco	Honduras, IX	2021
The Very Rev. Mark Goodman	Rio Grande, VII	2021
The Rev. Charles Graves	Texas, VII	2021
The Rt. Rev. Scott Hayashi	Utah, VIII	2021
Mr. Warren Wong	California, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Jabriel Ballentine of Province IV, who began the triennium as a member of the JSC on Mission Beyond TEC, resigned and was replaced by The Rev. Charles Graves, IV in 2019.

Mandate

To assist the Executive Council in highlighting issues and in the development of ministry beyond The Episcopal Church. Special areas of focus include Global Partnerships, Anglican Communion, Covenant Committees and Bilateral Relationships, Episcopal Migration Ministries, Ecumenical and Interreligious Partnerships and Dialogues, Domestic Government Policy via the Office of Government Relations, International Policy and Social Justice work, and Episcopal Relief and Development.

Summary of Work

The Joint Standing Committee name and mandate change from World Mission to the Joint Standing Committee on Mission Beyond The Episcopal Church

Beginning in February of 2018, the Executive Council and The Joint Standing Committee on Governance and Administration for Mission (GAM) began discussing the number and function of joint standing committees of the Executive Council and the DFMS. Drawing on these discussions, the Officers proposed a revision to the By-Laws which created four joint standing committees that were

approved by Executive Council in October 2018. The officers were of a common mind that the four proposed joint standing committees would: a) enhance the functioning of Executive Council; b) make each committee slightly larger (since there would be four rather than five committees) thus enabling the creation of more subcommittees and spreading the work of each committee among more members; and c) align the work of Council more closely with the presiding bishop's staff structure.

The Joint Standing Committee on World Mission handled many aspects that were considered both within and without The Episcopal Church. Work was therefore divided and given to the Joint Standing Committee on Mission Within The Episcopal Church (Mission Within) and the Joint Standing Committee on Mission Beyond The Episcopal Church (Mission Beyond). The following work came under the auspices of Mission Beyond: Global Partnerships, Anglican Communion, Covenant Committees and Bilateral Relationships, Ecumenical and Interreligious Partnerships and Dialogues, Domestic Government Policy via the Office of Government Relations, International Policy and Social Justice, and Episcopal Relief and Development.

A summary of Mission Beyond's resolutions which were presented to and approved by the Executive Council are listed in below.

General reports for each of the areas listed in the mandate are as follows:

Global Partnerships

Global partnerships engage missionaries all over the world to represent the Episcopal Church, engage in Christian fellowship, and form relationships of interdependence and mutual growth. This includes the Young Adult Service Corp, which sends up to 25 young adults as missionaries all over the world. This also includes Episcopal Volunteers in Mission, a similar program for older volunteers, and other types of mission engagement throughout the world. These relationships are especially important in ongoing relationships in the Anglican Communion. As this work is primarily about relationship and mutual growth, World Mission feels strongly that this is the work of The Jesus Movement in the world.

Anglican Communion

The current budget structure outlines Mission Beyond as it relates to The Jesus Movement. While much of what is contained in this report is Mission Beyond, it bears mentioning the ongoing and critical work we engage in with our Anglican Communion partners. This includes our participation at the Anglican Consultative Council, Primates meetings, the Anglican Bishops in Dialogue initiative, among other programs. This area of work is also relationship-based, as we share in Christian community throughout the world and engage in the Anglican tradition of The Jesus Movement. Due to the evolving nature of politics and faith throughout the world, it is crucial to continue to build partnerships with our Anglican brothers and sisters. World Mission supports budgetary efforts that continue and strengthen this work.

Covenant Committees and Bilateral Relationships

From The Episcopal Church's webpage on Bilateral and Covenant Relationships (episcopalchurch.org/bilateral-and-covenant-relationships): “Throughout its history The Episcopal Church has had an evangelistic mission, not just within the United States of America, but also around the world. Over the years we have helped nurture the development and growth of The Anglican Communion through the establishment of Anglican/Episcopal communities in many locations around the world. Initially, many of these churches were a part of the Episcopal Church as International Dioceses and many remain so today, such as dioceses of Province IX (Honduras, Dominican Republic, Colombia, Ecuador Central, Ecuador Literal, Puerto Rico, Venezuela) and the Diocese of Taiwan. Some Churches went along a different path and became independent; some within other Provinces of the Anglican Communion, such as Liberia, and others became Provinces in their own right such as Mexico, Brazil, and the Anglican Church of Central America (IARCA). In their path towards autonomy and self-governance it was realized that some financial support would be needed during the transition. Covenant Relationships were developed for this purpose. They provide clarity to the ongoing interdependent relationship, and to the financial support given over a period of years. It is important to note that this separation from the Episcopal Church was and is never to be seen as a severing of relationships, but rather the growth of new relationships based on mutual interdependence within an autonomous structure. The Episcopal Church has Covenant Relationships with the Diocese of Liberia, the Province of the Anglican Church of Central America (IARCA), and the Province of Mexico, all of which have ongoing financial commitments of support from The Episcopal Church. When the financial agreements end, the Covenant Relationship transitions to a Bilateral Relationship, honoring the commitment to ongoing mutual support, but without a specific financial commitment. The Episcopal Church has bilateral agreements with the Episcopal Church of the Philippines and the Anglican Church of Brazil.”

During this triennium, La Iglesia Anglicana de Mexico moved from a Covenant to a Bilateral Relationship with The Episcopal Church, with Mission Beyond recommending ratification of this Bilateral Relationship. Of note, La Iglesia Anglicana de Mexico (IAM) is proud of the fact that it was founded by reformation of the church within Mexico, not by a missionary effort from outside. IAM joined with TEC in the late 1800s, and a Covenant was formed in 1994, including a commitment of financial support from TEC. Now that the Covenant has come to an end, the relationship moves to a bilateral relationship. The same relationship will continue but there will be no financial component aside from possible block grants. The Bilateral Agreement was ratified by IAM at their Annual Synod, and the Executive Council was asked to ratify it.

For a current list of membership in Covenant Committees, please refer to the addenda near the end of this report.

Episcopal Migrations Ministries

Through Episcopal Migration Ministries, The Episcopal Church has been a partner with the U.S. Government in refugee resettlement program for many years, and during that time the church has assisted some 100,000 refugees to start new lives. With the presidential administration since 2016, the refugee resettlement program has become a shadow of itself. The ministries of EMM have been deeply and tragically affected by the policies of the current presidential administration, under which numbers of asylum seekers and immigrants has declined precipitously. In the year 2016 EMM had assisted 6,679

refugees. In the first year of the current administration (2017), that number dropped to 2,589, then to 1,537, and by the middle of the current year (2020) that number was 452. Before the pandemic, the number of refugees coming into the country was very low, and now it is even more profoundly reduced. The pandemic has changed the way EMM operates. The model of EMM is a social service model, working in the field with clients, but that model has had to adjust due to health and safety standards.

For the last two years EMM has been operating by government extension, leading to uncertainty for EMM work and our staff. Mission Beyond expresses its deep gratitude to the EMM staff for their resilience and dedication in the face of these conditions. Although the next triennium will likely see an increase in the U.S. Government for the refugee resettlement program under the incoming presidential administration, the rebuilding of the program will be slow.

Ecumenical and Interreligious Partnerships and Dialogues

Mission Beyond's broad umbrella includes Global Partnership, International Policy, Ecumenical Partnerships, Episcopal Relief and Development, Interreligious Partnerships and Dialogues. Mission Beyond relies upon many people who diligently work on all of the above and regularly report to the Committee Members on the status of their work. The work on Interreligious Partnerships and Dialogues is overseen and managed by the Task Force to Coordinate Ecumenical and Interreligious Work. For information on the ongoing work of Interreligious Partnerships and Dialogues readers are directed to the report from the Task Force to Coordinate Ecumenical and Interreligious Work found in this Blue Book.

Domestic Government Policy via the Office of Government Relations

From The Episcopal Church's webpage on the Office of Government Relation's ongoing work (episcopalchurch.org/OGR/ongoing-work): "As part of our commitment to support the most vulnerable among us, The Office of Government Relations advocates for rights for those living with disabilities, and for restoring, sustaining, and empowering communities affected by the U.S. criminal justice system. We also support our non-U.S. dioceses and Anglican Communion partners through advocating to the U.S. federal government for policies designed to promote peace and justice everywhere."

In February, 2020 Mission Beyond presented and Executive Council passed a resolution on Misinformation and Elections which directed the Office of Government Relations to advocate for free and fair elections and support responsible, educated civic engagement around elections. Resources have been robustly implemented. OGR has created a "comprehensive host of resources for advocacy, the U.S. Election, and 2020 Census engagement. Central to election engagement are the "Vote Faithfully" resources built up over the course of several election cycles and in coalition with ecumenical partners. These resources are designed for use year-round, emphasizing messaging that is non-partisan and informed." For a complete list of resolutions related to OGR please see the table below in this report.

International Policy & Social Justice

Mission Beyond considered several issues related to the fields of international policy & social justice. Mission Beyond acted through resolutions to the Executive Council to continue its implicit bias training and urged passage of a number of policing reforms to prevent abuse & misconduct. Mission Beyond also acted to draw attention to humanitarian crises in Venezuela and in the Amazon River Basin.

Episcopal Relief and Development

According to Episcopal Relief & Development’s bylaws, section 3.02, once the Board of Directors elects a director or directors, the election must be ratified by Executive Council. Mission Beyond’s role, after reviewing biographical information on the nominees, is to make such a recommendation to the full Council. By unanimous vote, Mission Beyond was pleased to recommend approval, over the last two years, the names of The Rt. Rev. Mary Gray-Reeves, The Rt. Rev. Wilfrid Ramos Orench, Mr. Miguel Escobar, Dr. David Martin, Ms. Shirley Stover Allen, Dr. Robert McCouch, The Rev. Steven Paulikas, The Rt. Rev. Jennifer Baskerville-Burrows, Mr. Michael Carscaddon, Mr. Kenneth Jones, and Ms. Karen Longenecker. Ratification by the full Council was unanimous by consent.

Mr. Rob Radtke, the president of Episcopal Relief & Development, attends each Mission Beyond committee meeting, giving an update on the many programs, projects, and activities of which the agency is engaged. Mission Beyond is pleased to encourage and assist Episcopal Relief & Development in the incredible work being done around the world. Episcopal Relief & Development’s approach to a community asset-based model, which provides assistance and guidance, allows local communities to “do it themselves” – an approach that is far more sustainable and effective in producing results. Episcopal Relief & Development is “on the ground” supporting local partners in a wide range of responses to world crises and needs.

For more information on Episcopal Relief & Development’s worldwide responses to COVID-19, hurricanes and other natural disasters, children’s health care, and much more, visit www.episcopalrelief.org

JSC on Mission Beyond TEC: Summary Table of Resolutions

Oct 15, 2018 - Oct 18, 2018, Chaska

MB 001 [Commending the Work of Episcopal Migration Ministries](#)

Feb 21, 2019 - Feb 24, 2019, Midwest City

MB 002 [Approval of The National Council of Churches Interreligious Convening Table Appointment](#)
MB 003 [Encouragement to the United Methodist Church, Meeting at a Special Session of General Conference](#)
MB 004 [Pastoral Response on Venezuela](#)

Note: There were no resolutions MB 005 and MB 006.

Jun 10, 2019 - Jun 13, 2019, Linthicum Heights

MB 007 [Appointments to Ecumenical Committee](#)
MB 008 [Support Sustainable Peace in Burundi](#)
MB 009 [Support for Multilateralism and the Work of the United Nations](#)
MB 010 [Continue to Support and Expand Upon Implicit Bias Training](#)
MB 011 [Vaccines](#)

Oct 18, 2019 - Oct 21, 2019, Montgomery

MB 012 [Ratify Election of Board of Episcopal Relief & Development](#)
MB 013 [Appointment to Lutheran Episcopal Coordinating Committee Ratify Bilateral Agreement](#)
MB 014

Feb 13, 2020 - Feb 15, 2020, Salt Lake City

MB 015 [Antimicrobial Resistance \(AMR\)](#)
MB 016 [Misinformation and Elections](#)

Jun 8, 2020 - Jun 11, 2020

- MB 017 Policing Reform
- MB 018 Executive Council Ratification of the Election of members of the Board of Episcopal Relief and Development
- MB 019 Courtesy resolution for Young Adult Service Corps & Episcopal Volunteers in Mission participants
- MB 020 Expression of Support for the Human Rights and Continued Existence of the Indigenous Peoples of Amazonia
- MB 021 A Recognition of the Global Implications of the COVID-19 Pandemic

Oct 9, 2020 - Oct 12, 2020

- MB 022 Current Need for Translation and Transcription Services for DFMS Staff
- MB 023 Translation and Transcription Services for DFMS Staff for the 2022-2024 Triennium Budget

CONCLUSIONS AND RECOMMENDATIONS

The Executive Council’s Joint Standing Committee on Mission Beyond The Episcopal Church, led by the Chair Dabney Smith, remained focused on the committee members’ determination at the start of the triennium to responsibly manage its oversight and fiduciary roles. Mission Beyond adjusted its agenda as necessary while maintaining its mandate to committee specific concerns as well as overall board responsibilities general to Executive Council. In addition to the required and expected committee and subcommittee responsibilities, Mission Beyond committee members, for instance, met with staff during Executive Council meetings to consult with and for an explanation of budgetary and other financial matters, especially for budgetary realignment during the COVID pandemic.

The Executive Council Joint Standing Committee on Mission Beyond The Episcopal Church has been particularly grateful for the service of committee members Mayra Liseth Gonzales Polanco, Dabney Smith, and Warren Wong whose tenures end at the 80th General Convention.

Supplemental Materials

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1. [Addendum: Membership of Covenant Committees](#)
2. [Addendum: Report of A Igreja Episcopal Anglicana do Brasil](#)
3. [Addendum: Report of the IARCA \(Iglesia Anglicana de la Región Central de América / Anglican Church of the Region of Central America\) Covenant Committee](#)

Addendum: Membership of Covenant Committees

Membership for Covenant Committee: A Igreja Anglicana do Brasil:

Ms. Diane Butler	Rio Grande, VII	2021
The Rt. Rev. Dr. Edward Konieczny	Oklahoma, VII	2021
The Rev. Lorraine Mills-Curran	Massachusetts, I	2024
The Rev. Adam Shoemaker	South Carolina, IV	2024

Membership for Covenant Committee: La Iglesia Anglicana de la Región Central de América:

The Rev. Canon Dr. Lee Crawford, <i>Chair</i>	Vermont, I	2021
Ms. Blanca Echeverry	Colombia, IX	2021
The Rt. Rev. Alan Gates	Massachusetts, I	2024
Ms. Linda Watt	Western North Carolina, IV	2024

Membership for Covenant Committee: La Iglesia Anglicana de Mexico:

The Rt. Rev. Lucinda Ashby, <i>Chair</i>	El Camino Real, VIII	2024
The Rev. David Ulloa Chavez	Arizona, VIII	2024
The Very Rev. Don Compier	Kansas, VII	2024
The Rt. Rev. Jeff Fisher	Texas, VII	2024
Ms. Pauline Getz	San Diego, VIII	2021
Mr. Jody Guerra	West Texas, VII	2024

Membership for Covenant Committee: The Episcopal Church in Liberia:

The Rev. Dr. Wilmot Merchant, <i>Chair</i>	South Carolina, IV	2021
Dr. Liza Anderson	Minnesota, VI	2021
The Rt. Rev. Oge Beauvoir	Haiti, II	2024
The Rev. Canon Dr. J. Peter Pham	Chicago, V	2024

Membership for Covenant Committee: The Episcopal Church in the Philippines:

The Rt. Rev. Robert Fitzpatrick, <i>Chair</i>	Hawaii, VIII	2021
The Rt. Rev. Diane M. Jardine Bruce	Los Angeles, VIII	2024
Mr. Louis Glosson	San Diego, VIII	2021
The Rev. Canon Robert Hino	Hawaii, VIII	2021

Report of A Igreja Episcopal Anglicana do Brasil

Membership

Ms. Diane Butler	Rio Grande, VII	2021
The Rt. Rev. Dr. Edward Konieczny	Oklahoma, VII	2021
The Rev. Lorraine Mills-Curran	Massachusetts, I	2024
The Rev. Dr. Adam Shoemaker	South Carolina, IV	2024

Other participants include:

Mr. Pedro Andrade, The Rt. Rev. Francisco de Assis da Silva, The Very Rev. Dr. Gustavo Gilson Souza de Oliveira, The Rev. Magda Guedes, Ms. Janete Tavares, The Rev. David Copley, The Rev. Glenda McQueen

Summary of Work

TEC committee members assembled for mutual introductions and program planning in January 2019. There was a commitment to revitalizing the relationship and hosting one in-person meeting, since one has not occurred since 2014. Glenda McQueen facilitated the set-up of a phone call for all members of the committee and the first bilateral meeting was held by Zoom in June 2019.

It was determined that the top priority was arranging for an in-person visit. Over the latter part of 2019, it was agreed to plan a visit of the Brazilian representatives to the U.S. Lorraine Mills-Curran undertook to get approval from Bp. Alan Gates of the Diocese of Massachusetts to host such a visit in Sept. 2020.

COVID-19 concerns interrupted these plans. In their May 2020 Zoom meeting the group acknowledged the necessity to cancel. A good deal of sharing of common challenges and worries brought into high focus that Brazil's experience with COVID was deeply hampered by infrastructure limitations. The IEAB was working imaginatively and cross-denominationally to address the situation.

The group then met for in June 2020 for a lengthy call, addressing developments in both countries concerning the church's response to the pandemic. All people across the globe were sharing the experience of an avalanche of issues without adequate resources to address them. Opportunities for new ways of accomplishing the church's task, and increased charity donations, were positive effects of the pandemic. The Brazilian members of the committee noted a desire to address possibilities for enhanced Christian and theological education, and the decision was made to address these issues in our next call.

There was some difficulty in convening a call, and the word was received that one of our members had died. Pedro Andrade was the son of a Brazilian bishop and well-known to our Brazilian members.

The group reconvened in Sept. 2020, and the Brazilian members asked for specific assistance with

various issues: 1) developing online theological education; 2) developing companion diocese relationships, and 3) assistance clarifying resources available from the United Thank Offering to Brazil. Bp. Ed will attempt to interest bishops in companion diocese relationships at the House of Bishops meeting; Bp. Ed and Lorraine Mills-Curran will put Brazilian Committee members in touch with on-line education providers with which they are familiar; and Glenda will facilitate a clarifying conversation with UTO.

The committee has met its goal of revitalizing the relationship, and warm relationships have begun to be developed. Despite the challenges of dealing with COVID in both countries, it is anticipated that the long-planned visit will take place when pandemic issues lessen. The committee will continue their work as described.

Report of the IARCA (Iglesia Anglicana de la Región Central de América / Anglican Church of the Region of Central America Covenant Committee

Membership

TEC Members

The Rev. Canon Dr. Lee Crawford, <i>Chair</i>	Vermont, I	2021
Ms. Blanca Echeverry	Colombia, IX	2021
The Rt. Rev. Alan Gates	Massachusetts, I	2021
Ms. Linda Watt	North Carolina, IV	2021

IARCA Members

The Rt. Rev. Juan David Alvarado	El Salvador
The Rev. Harold Dixon	Nicaragua
The Rt. Rev. Silvestre Romero	Guatemala
The Rt. Rev. Orlando Gómez Segur	Costa Rica
The Most. Rev. Julio Murray, <i>Primate of IARCA</i>	Panama
The Rev. Ramon Ovalle, <i>General Secretary</i>	Guatemala

Summary of Work

During this triennium, the joint committees of IARCA-TEC did not meet, because our partners in the Anglican Church of the Region of Central America were engaged in important, internal work—work that will enable all to move forward in mission. The chair appreciates the members of the TEC panel for their forbearance and understanding of the rather unusual commitment they made by

joining this committee over two years ago. The chair also thanks the Rev. Glenda McQueen, TEC's Officer for Latin American and the Caribbean, for her assistance.

At the end of the previous triennium, and after the last IARCA-TEC covenant committee meeting in April 2016 in Guatemala, both sides of the committee hoped that a subcommittee of bishops from both provinces would create a new covenant of mission. At that long-ago meeting, both sides expressed a strong desire to create a document that would express a covenant of mutual mission so that our conversations would move beyond solely the financial aspects of the covenant.

As reported in the *2018 Blue Book Reports to the 79th General Convention*,

We focused much time and conversation on a desire and need to revise the original Covenant, which was first adopted in July of 1997. We are halfway through the Covenant period and there have been changes, some small, many significant, in that time. Part of the revision work would be to create a glossary of pertinent terms in the Covenant and how we understand them. It would also be vital to ensure that the English and Spanish documents say the same thing. Finally, a revised covenant would include a description of the common life of IARCA (37-38).

This work had not come to pass during the previous triennium and there was no follow-up during this triennium. However, this outline of topics can well serve as guidelines for future revision of a covenant of mission in the next triennium.

During this triennium, IARCA held its Provincial Council meeting in July 2019, at which the Rev. Glenda McQueen spoke with members about the on-going relationship between TEC and IARCA, since the formation of the province in 1997. The bishops of IARCA are particularly interested in having relationships with TEC House of Bishops, by invitation to the HOB meetings and by having TEC bishops meet with them.

Since the last joint IARCA-TEC covenant committee meeting in 2016 in Guatemala, the House of Bishops of IARCA has undergone a major change in membership. With the retirement of all TEC-consecrated bishops since 2016 (Guatemala, Costa Rica and Nicaragua), the now-complete IARCA-consecrated House of Bishops has needed this triennium to organize itself and work on internal matters. Not until its meeting in December 2020 did the IARCA House of Bishops appoint its liaison to this committee, the Rt. Rev. Silvestre Romero. Bishop Romero served on TEC's Executive Council prior to his consecration and will provide an excellent interpreter and contact with the IARCA panel members.

In a December 2020 Zoom conversation with Bishop Romero, the chair of this committee heard the desire of the IARCA covenant committee to resume the conversation where it left off almost five years ago. Bishop Romero reiterated the interest in reworking a covenant of mission where both provinces can come together to work in mission. He stated that there is great interest and enthusiasm on the part of the IARCA bishops.

Likewise, with the pandemic that has shut everything down, paradoxically it will be easier for the two provinces to meet together via Zoom, WhatsApp or other social networking platforms. A huge impediment for the IARCA covenant committee in the past has been the cost of in-person gatherings, particularly for clergy and lay members. Going forward, both sides might have more

freedom to meet virtually and explore new expressions of covenant. Both Bishop Romero and this chair believe there exist many possibilities for joint mission virtually and on-the-ground.

With the blessing and encouragement of the President of the House of Deputies, the Rev. Gay Jennings, the two panels will meet together virtually in February 2021 for the first of what is hoped-for many conversations. Given that COVID-19 has affected and disrupted all of our lives, we will talk about how the churches in IARCA and TEC alike have responded to the challenges of the pandemic, which will lead into deeper discussions about what a future covenant of mission might look like. While the work of the committee will fall outside the bounds of the reporting period of this *Blue Book*, the work on mission and covenant will not cease.

Covenants have their seasons and their ebb-and-flow. For the most of this triennium, the work has seemed to have lain fallow. However, our friends in Central America have quietly been sowing seeds, which will help our common mission in Christ to flourish with new energy and enthusiasm in the years ahead.

Report Submitted by

The Rev. Canon Dr. Lee Alison Crawford, *Chair*
Vermont, I

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON MISSION WITHIN THE EPISCOPAL CHURCH

Membership

Ms. Julia Ayala Harris, <i>Chair</i>	Oklahoma, VII	2021
The Hon. Rose H. Sconiers, <i>Vice-Chair</i>	Western New York, II	2021
Mr. George Wing, <i>Secretary</i>	Colorado, VI	2021
The Rt. Rev. Lloyd Allen	Honduras, IX	2021
The Rev. Devon Anderson	Minnesota, VI	2021
Canon Noreen Duncan	New Jersey, II	2021
The Rev. Angela Goodhouse-Mauai	North Dakota, VI	2021
Canon Dr. Steven Nishibayashi	Los Angeles, VIII	2021
The Rev. Dr. Steven Pankey	Kentucky, IV	2021
Ms. Sarah Stonesifer Boylan	Washington, III	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Frank S. Logue left in February of 2020. Frank was replaced by The Rev. Dr. Steven Pankey.

Mandate

Evangelism, Church Planting, Congregational Redevelopment. Racial Justice and Reconciliation. Care of Creation and Environmental Stewardship. Formation and Education. Public Policy and Social Justice. Relevant Grants Review.

Summary of Work

Building on one of the themes from the past two General Conventions, GC78 and GC79 in Salt Lake City and Austin, Mission Within had racial reconciliation, evangelism, and care of creation as its primary focus for its work this triennium. At the first meeting for the triennium in October of 2018, Executive Council committed to keeping these priorities at the forefront of its work together as a Board of Directors. This led to agenda-setting activities in which time for reflection and connection around racial reconciliation was prioritized. The following themes emerge from the work of Mission Within during this triennium:

- **Racial Justice:** One of the most prominent ways that Mission Within tackled racial justice was to provide financial support directly to four dioceses in order to dismantle racism. This was done to send the message that this was not business as usual and that The Episcopal Church is invested in dismantling systemic racism in times of crisis, where and when it's needed most.
- **Impact of COVID-19 on Communities of Color:** For several meetings of Mission Within, we have reflected on the circumstances by which we found ourselves, amidst a global pandemic. We have noted the many ways in which the COVID-19 pandemic exposed long-standing inequalities from centuries of systematic oppression in communities of color across our county. Mission Within also took note that it is communities of color that felt a disproportionately negative impact from the COVID-19 crisis.
- **Becoming Beloved Community Rapid Response Grants:** Mission Within worked with the Presiding Officers' Advisory Group on Beloved Community Implementation to initiate two cycles of Becoming Beloved Community Rapid Response Grants in order to address the intersection of the twin-pandemics of Covid-19 and racism.
- **Police Violence:** Mission Within members discussed their grief over the deaths of Mr. George Floyd, Ms. Breonna Taylor, Mr. David McAtee, and all other victims of police brutality.
- **Model Vaccination Policies:** Mission Within worked with a cross-section of staff to develop a resolution that called for model vaccination policies for Episcopal entities.
- **Poverty:** Mission Within was faced with several issues related to poverty and wealth disparities during this triennium.
- **Collaboration with Interim and Grant-making Bodies:** Mission Within worked with several other interim bodies and committees in order to disperse grants throughout the church. These included such bodies as: the Task Force on Care of Creation and Environmental Racism, the Evangelism Grants Committee, the Task Force on Church Planting and Congregational Redevelopment, Presiding Officers' Advisory Group on Beloved Community Implementation, United Thank Offering, Roanridge Trust Grants, Constable Fund Grants, and Young Adult and Campus Ministry grants among others.

As a natural extension of its mandate, Mission Within exercises a prophetic role by calling the wider Church into courageous conversations about racial justice, evangelism, poverty, violence, criminal justice, and the institutions that support these systems. Mission Within has continued to press forward toward our dream of becoming a beloved community through resolutions, board development, personal storytelling, and training.

Proposed resolutions

A054 Create a Task Force on Senior Wellness and Positive Aging

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON FINANCE

Membership

The Rev. Mally Ewing Lloyd, <i>Chair</i>	Massachusetts, I	2021
Ms. Diane Pollard, <i>Vice-Chair</i>	New York, II	2021
Ms. Holli Powell Sturm, <i>Vice-Chair</i>	Lexington, IV	2021
Mr. N. Kurt Barnes, <i>Treasurer</i>	New York, II	
The Rev. Patty Downing	Delaware, III	2021
The Rev. Canon Cornelia Eaton	Navajoland Area Mission, VIII	2021
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2021
The Rev. Anne E. Kitch	Newark, II	2021
Ms. Alexizendria Link	Western Massachusetts, I	2021
Mrs. Andrea McKellar	South Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

We would like to acknowledge the numerous contributions of the following staff: Mrs. Nancy Caparulo, Ms. Margareth Crosnier de Bellaistre, Mr. Patrick Haizel, Mr. T. J. Houlihan, and Ms. Cecilia Malm. We are also grateful to members of PB&F: The Rev. Canon Mike Ehmer, *P.B. & F. Chair*; The Rt. Rev. Jeff Fisher; Mr. William Fleener, Jr.; Ms. Tess Judge; and Mr. David Quittmeyer.

Mandate

Oversight of the triennial budget and development of annual budgets. Development of the triennial General Convention budget. Oversight for the disposition of funds and other property of the DFMS. Development and Mission Funding. Review and recommend changes to the Audit Charter to Executive Council. Review Diocesan Financial Reports including Part II per Canon I.4.6(j). Monitor and review diocesan assessments.

Summary of Work

Work: The Committee's goal is to facilitate the ministry of The Episcopal Church in partnership with staff and other Executive Council Joint Standing Committees; to maintain close relationships with the General Convention through regular contact with the Joint Standing Committee on Program, Budget and Finance and the Joint Audit Committee of Executive Council and DFMS; and to support the work of the Office of the Treasurer.

Meetings: The Joint Standing Committee on Finance (FIN) met at every regular Executive Council meeting and 12 additional times by Zoom meeting. The Chair and other members of Program, Budget and Finance (PB&F) were invited to attend all Finance meetings. The Treasurer of DFMS, as well as additional staff from the finance office and the development office were present at most meetings. DFMS staff periodically visited FIN meetings to offer their expertise regarding financial implications of their areas of oversight.

The work of FIN, centered on managing the budget and being responsive to the changing needs of the Church, was profoundly affected by COVID 19 and the Black Lives matter movement. In the spring of 2020, the 2022-2024 budget process had to be delayed, the 2020 budget adjusted mid-year, and the 2021 budget re-worked to take into account not only the constantly shifting churchwide financial effects of the pandemic but also changing priorities. FIN worked closely with the staff of DFMS, who submitted multiple budget proposals for their areas as the situation continued to change.

Beginning in April of 2020, much of the FIN work related to responding to financial issues resulting from the COVID pandemic, which necessitated meeting via Zoom 12 times from May through October. This work included:

- Reviewing that Payment Protection Program loan/grant
- Working with the Budget Management Document adopted by Executive Council as guide for 2020 and 2021 budget revisions
- Reviewing and recommending 2020 budget adjustments
- Creating a responsive 2021 budget
- Revamping 2022-24 budget process and expanding the 2022-2024 budget committee to include members from other Joint Standing Committees
- Responding to changing needs of the church due to the pandemic
- Reviewing and recommending grants for racial reconciliation work awarded to the dioceses of Atlanta, Georgia, Minnesota, and Kentucky
- Reviewing and recommending Becoming the Beloved Community Rapid Response grants

It is Executive Council's responsibility to propose a budget for the 2022-24 triennium to the 80th General Convention. The 2022-2024 budget subcommittee of FIN developed a budget process, familiarized themselves with detailed aspects of the budget, and examined each area of the budget in light of General Convention priorities. Budget input was solicited from staff, members of joint standing committee, and the Church at large. In light of the delay of 80th General Convention to the summer of 2022, FIN began work on a 2022 budget process and continued to adapt the process for creating a 2023-2024 proposed budget, working with PB&F, and gathering input from staff, members of other joint standing committees, and information received via General Convention resolutions. FIN continued to work with the Jesus Movement budget framework developed prior to the 79th General Convention.

Areas of FIN's process review included but was not limited to:

- Reviewing the church's budget process, including hearing reports from and giving feedback to the Budget Process Task Force
- Reviewing the work of the Office of Development
- Reviewing periodic financial statements, Audit Committee reports, and statements of operation for DFMS.
- Receiving reports and recommendations from the Committee on Corporate Social Responsibility (CCSR)
- Reviewing Investment Committee recommendations and Policy
- Reviewing Economic Justice Loan Committee recommendations and process
- Review of funding for grants from the budget and trusts
- Review of DFMS policies, e.g. Travel, CCSR Scope of Work Plan, Investment Policy, Audit charter

In other areas, on behalf of the Executive Council, FIN's work included:

- Monitoring mission, governance, legal, and administrative expenses
- Monitoring and recommending adjustments to the 2019-2021 triennial budget adopted by the General Convention
- Creation of the process for preparing the 2022-2024 Budget
- Financial implications of Cuba rejoining the Episcopal Church
- First triennium of the Assessment Review Committee (ARC) and waiver process
- Recommendations for the establishment of custodial trust funds for various parishes and dioceses.
- Reviewing challenges faced by Historically Black Colleges and Universities (HBCUs)
- Reviewing financial implications of Sharing the Way of Love

- Receiving reports from the Archives and recommending financing for new interim location
- Creation of an ad hoc committee to review financial needs of the Diocese of Honduras
- Reviewing challenges and financial implications of Covenant relationships with other churches

As a final note, FIN thanks the DFMS staff who supported the work of FIN during the time of pandemic with grace, competence, reliability, and faithfulness. Staff put in extraordinary effort and hours at a time when their lives too were affected by the crisis. Their work was exemplary, and this committee is exceedingly grateful.

EXECUTIVE COUNCIL REPORTS

Committees Reporting Through Executive Council

Joint Audit Committee of the Executive Council and the DFMS

Assessment Review Committee

Executive Council Investment Committee

Executive Council Economic Justice Loan Committee

Executive Council Committee on Corporate Social Responsibility

Executive Council Conant Fund Grant Review Committee

Executive Council Constable Grant Review Committee

Executive Council Roanridge Trust Grant Review Committee

Scholarship Grant Committee

Executive Council Committee on Anti-Racism & Reconciliation

Executive Council Committee on HBCU

United Thank Offering Board

Anglican-Roman Catholic Dialogue in the USA

Moravian Episcopal Coordinating Committee

Presbyterian Episcopal Dialogue Committee

United Methodist Episcopal Committee

JOINT AUDIT COMMITTEE OF THE EXECUTIVE COUNCIL AND THE DFMS

Membership

Mr. Bryan Krislock, <i>Chair</i>	Olympia, VIII	2021
Dr. Delbert Glover, <i>Vice-Chair</i>	Washington, III	2021
Mr. G. William Haas	New York, II	2021
Ms. Tess Judge	East Carolina, IV	2021
The Rev. Mally Ewing Lloyd	Massachusetts, I	2021
The Rt. Rev. Phoebe Roaf	West Tennessee, IV	2021

Mandate

Canon I.4.3

Sec. 3 Upon joint nomination of the Chair and the Vice-Chair, the Executive Council shall elect an Audit Committee of the Council and the Domestic and Foreign Missionary Society. The Committee shall be composed of six members: one from the Executive Council committee with primary responsibility for financial matters; one from the Joint Standing Committee on Program, Budget, and Finance; and the remaining four from members of the Church-at large having experience in general business and financial practices. The members shall serve for a term of three years beginning on January 1 following a regular meeting of the General Convention or immediately following their appointment, whichever comes later, and continue until a successor is appointed, and may serve two consecutive terms, after which a full triennium must elapse before being eligible for re-election. Annually the Audit Committee shall elect a Chair of the Committee from among its members. The Audit Committee shall regularly review the financial statements relating to all funds under the management or control of the Council and the Domestic and Foreign Missionary Society and shall report thereon at least annually to the Council.

Summary of Work

As we draft our report in the waning weeks of 2020, we draw attention to the impact COVID-19 has had on our traditional ways of functioning throughout most of this year. And even as the distribution of the vaccine begins, we note with gratitude the immediate and caring response of leadership throughout the Church for the wellbeing parishioners, staff, clergy and a host of others with whom we are in relationships of mutual responsibility and accountability.

The Executive Leadership Team, including the Presiding Bishop and the President of the House of Deputies and many others have taken steps to cancel and/or reduce physical worship services and in-person meetings. In full compliance with this directive, the Audit Committee was able to conduct and complete its work without interruptions.

The Audit Committee provides oversight of the financial reporting process, the audit process, the system of internal controls, and compliance with laws and regulations on behalf of Executive Council. New York State law, and industry best practices, recommend (and in some cases require) that an organization appoint an audit committee comprised of independent, non-employee members to provide oversight of the organization.

To exercise this oversight, the committee is given broad authority to discuss issues of concern with staff members, employees, board members, and other individuals as needed.

The Audit Committee and the Executive Council and the Domestic and Foreign Missionary Society engage an independent Certified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. The Committee may, with the approval of Executive Council, also hire such independent investigators and firms as may be necessary to review allegations that come to the Committee's attention.

The Audit Committee uses the findings of the annual audit to recommend to the Council and the Domestic and Foreign Missionary Society the action needed for any matters identified in the annual audit and accompanying management letter.

The Committee met six (6) times during the years 2018, 2019 and 2020— three (3) times each year—usually at the Church Center. However, beginning in March, 2020, all meetings were conducted virtually. Virtual meetings allowed us to conduct our affairs with minimal inconvenience and no interruptions. We were able to continue our practice and with senior staff members in executive session to ensure that candid conversations could occur regarding any legal, financial, or other risks to the organization and receive regular updates on pending litigation.

The Committee also continued to monitor reputational risks to the organization.

According to its chartered responsibilities, the Committee reviewed:

- Quarterly and annual financial statements and the judgments and assumptions underlying them;
- The adequacy of the Society's internal controls especially for cybersecurity
- The performance, and subsequent recommendation for the appointment, of the external auditing firm;
- The nature and scope of the proposed audit with the independent auditing firm;
- The final audit report of the Society's financial statements and the independent auditors' recommendations to management for improvements in any areas of weakness; and,
- In cooperation with the Society's legal counsel, any potential liability exposure that could directly affect the Society's financial statements.

Unqualified opinions were received from the independent auditing firm Grant Thornton for the 2018 and 2019 financial years. The Executive Council accepted these reports upon recommendation from the Audit Committee.

Major Projects in This Triennium Include

1. The Annual Review of the Audit Committee Charter and our Self Appraisal

The Committee reviewed its charter and recent changes to New York State Law—where the DFMS is incorporated—on the role of the Audit Committees in Corporate Governance. After conducting the review, the Committee recommended changes to the Charter that included responsibility for reviewing the DFMS's risk management program, reputational and other, non-financial risks to the organization. The Executive Council accepted the recommended revisions to the Audit Committee's charter.

2. The Appointment of the External Auditor

In 2017, the Audit Committee conducted a comprehensive request for a proposal process for the selection of a new auditor for the 2018-2021 triennium. The selection criteria were prepared and firms were invited to submit proposals. The firms were evaluated by criteria such as price, capability, financial stability, expertise, staff turnover, and industry reputation. Given the international nature of the church, with operations in multiple countries, the ability of a firm to handle international issues was a priority.

Five (5) firms submitted proposals and based upon the selection criteria, they were invited to prepare and present to the Committee. The Committee then reviewed the proposals and recommended Grant Thornton, LLP. This recommendation was forwarded to and approved by the Executive Council.

3. Internal Auditor and Enterprise Risk Assessment

The Committee continued a discussion regarding the need for an Internal Auditor for the DFMS. It has been the past practice for there to be an Internal Auditor, an employee of the DFMS who reported to the Treasurer and the Audit Committee to review specific areas of concern or risk to the organization. For example, if the Committee members were concerned about abuses involving travel expenses and the travel policy or compliance with the terms and conditions grants awarded by the Executive Council, the Internal Auditor would review and report findings to the Audit Committee.

After consulting with the independent audit firm, the Audit Committee decided that an Enterprise Risk Assessment was necessary to identify what areas of risk to the organization may exist. This step is necessary to understand how an internal auditor may help reduce those risks to the organization and would help provide a job description for this. The Committee is working with the Chief Operating Officer and that process is underway.

4. Development of Policy and Procedures Manuals

We previously observed that neither the Executive Council nor the General Convention maintains a codification of the policies and procedures adopted by the General Convention and Council. As a result, there is a significant risk that adopted policies and procedures will be lost, misremembered, or forgotten. Included within this policy manual would be an updated whistleblower policy, travel policy, conflict of interest policy, and other operational policies. We are continuing those conversations about the value of this recommendation.

5. Succession Planning

There are currently several long-term, key staff who contain significant institutional knowledge about the operations of the DFMS. In addition, key elected and volunteer positions have regular turnover due to the nature of their terms and positions. The Committee has recommended the creation of succession plans for key positions to ensure that in the event of an unexpected, or expected turnover, there is a strong transition plan in place.

6. Internalized Strategic Planning

In conducting its audit and review of the staff , the Committee reviewed the current operations and decision-making processes. As a consequence of this review, the Committee recommends that the current structure and governance procedures of the board be evaluated to ensure that there is a regular review of the strategy to ensure decisions to allocate resources are done based upon this plan. This is an ongoing review.

ASSESSMENT REVIEW COMMITTEE

Membership

The Rev. Mally Ewing Lloyd, <i>Chair</i>	Massachusetts, I	2021
Mr. N. Kurt Barnes, <i>Treasurer</i>	New York, II	
The Rev. Patty Downing	Delaware, III	2021
The Rt. Rev. William Klusmeyer	West Virginia, III	2021
Ms. Nancy Koonce	Idaho, VIII	2021
The Rt. Rev. Mark Lattime	Alaska, VIII	2021
The Rt. Rev. Gregory Rickel	Olympia, VIII	2021
Canon Rosalie Simmonds Ballentine	Virgin Islands, II	2021
The Rev. Dr. James Taylor	South Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

Nancy Caparulo, Treasurer's Office Staff, *Secretary to the committee*

"The Assessment Review Committee wishes to thank Nancy Caparulo for her excellent and timely minutes." - the Rev. Mally Ewing Lloyd, Assessment Review Committee, Chair

Mandate

2015-FFM 074 Create Diocesan Assessment Review Committee

The following is a true copy of a Resolution adopted by the Executive Council at its meeting from January 9-11, 2015 at which a quorum was present and voting.

Resolved, That Executive Council, meeting in Linthicum Heights from January 9-11, 2015, approve the creation of a Diocesan Assessment Review Committee, under the oversight of the Joint Standing Committee Finances For Mission (FFM), to work with dioceses that do not commit to pay their full assessment to The Episcopal Church in any year, to talk with diocesan leaders about the reasons for

not paying the full amount, including reviewing diocesan financial statements, and to encourage and work with such dioceses to create a plan for reaching the full assessment amount; and be it further

Resolved, That the Presiding Bishop and the President of the House of Deputies shall appoint the members of the Committee; and be it further

Resolved, That the Diocesan Assessment Review Committee have the authority to recommend that Executive Council grant a full or partial Waiver of Assessment to any diocese, allowing it to pay a lower assessment amount than levied in The Episcopal Church's budget, based on financial hardship, an appropriate plan for reaching the full assessment over time, or other factors; and be it further

Resolved, That Executive Council has the authority to consider the Diocesan Assessment Review Committee's recommendations and determine whether a Waiver of Assessment shall be granted; and be it further

Resolved, That any diocese that does not plan to pay its full assessment amount, and has not received a Waiver of Assessment be asked to account in writing to Executive Council and the wider church for that choice; and be it further

Resolved, That a diocese that does not pay its full assessment in any year, and has not received a Waiver of Assessment, shall not be eligible to receive any grants or loans from the Domestic and Foreign Missionary Society.

FFM is responsible for further practical details/refinement at the March meeting.

Summary of Work

Meetings: The Assessment Review Committee met once face-to-face and had six Zoom meetings through December 2020.

In January 1, 2019, assessments of dioceses to support the Episcopal Church budget became mandatory. The Assessment Review Committee began in the fall of 2016 to develop and publicize to the church the process for applications for assessment waivers. The first waivers were granted in October 2018 for the 2019 assessment year. Dioceses failing to commit to or pay their 2019 assessment were ineligible for DFMS grants or loans in 2020.

Waiver application forms were posted on the finance Office webpage so the application process is completely on line for 2021 applications. An application, statement of financial hardship, current

REPORTS TO THE 80th GENERAL CONVENTION

budget, diocesan report, and audit are required from each applicant. Executive Council adjusted deadlines between 2017 and 2020 as dioceses became familiar with the process. Beginning in 2021 and moving forward, the deadline for regular applications will be January 31 of assessment year. Dioceses may apply anytime when beset by unforeseen financial hardship. Dioceses are ineligible for grants and loans in the year following a year when no waiver was granted or their payment of assessment was below the assessment total.

The goal of the committee was to build relationships with dioceses facing financial hardship by understanding their ministries and hearing stories of challenges and successes and to help develop financial security by focusing on partnership vs. punishment. In addition, the goal of General Convention in reducing the assessment over time was to make it possible for more dioceses to participate fully in the life of the Episcopal Church. The following chart shows the increased diocesan participation as the assessment percentage decreased and waivers became available:

Year	2013	2014	2015	2016	2017	2018	2019	2020 as of 9/14/2020
Asking% Assessment	19%	19%	19%	18%	16.5%	15%	Assessment 15%	Assessment 15%
Dioceses at Full Asking	44	47	45	56	61	75	86 ? at 15% 19 ? waivers 4 ? no waivers	79* ? at 15% 12-waivers 5? no waivers

*13 no commitment form as of June 2020

REPORTS TO THE 80th GENERAL CONVENTION

The following charts show waiver applications, dioceses ineligible for grants and loans in 2020, and pending applications for 2021 waivers as of November 30, 2020:

Diocese	Waiver granted	Year(s)	Terms
Alabama	Y	2019	2019 - 12.5% (2020 will be at 15%)
Arizona	Y		Forgive past due assessments; at 15% in 2019
Central Gulf Coast	Y	2019-2021	2019 - 12%; 2020 ? 14%; 2021 ? 15%
Colombia	Y Y	2019 2020	\$1500, 1 year waiver; keep talking \$0, 1 year waiver; keep talking
Colorado	Y	2019-2021	2019 - 10%; 2020 ? 12%; 2021 ? 13.5%
Convocation of Churches in Europe	Y	2019,2020	12.5% of 80% of income; keep talking for 2021 (technically not a diocese)
Dallas	Y	2019, 2020	2019 ? 6.1%; 2020 ? 12.1% (2021 ? 15.0%)
Dominican Republic	Y Y	2019 2020	\$15,000, 1 year waiver; keep talking \$8500, continue discussion for 2021
Ecuador Central	Y	2019,2020	2019 - \$2,063; 2020 - \$3,500; keep talking
Fond du Lac	Y	2019,2020	2019 - 11.9%; 2020 ? 12%; 2 year waiver, keep talking
Haiti	Y	2019-2021	Will move from \$5000-\$11,000 over the triennium
Honduras	Y	2019	\$1500, 1 year waiver; keep talking
Minnesota	Y	2019	\$33,379, due to overpayment of 2018 assessment by that amount
Mississippi	Y	2019-2021	2019 - 10%; 2020 ? 12%; 2021 ? 13%
Puerto Rico	Y	2019-2021	full waiver for triennium; will pay something if they can (Hurricane Maria)
Taiwan	Y	2019	\$3000, 1 year waiver; keep talking
Venezuela	Y	2019	\$1500, 1 year waiver; keep talking
Virgin Islands	Y	2019-2021	full waiver for triennium; will pay something if they can (Hurricane Maria)
West Texas	Y	2019-2021	2019 - 12%; 2020 ? 13%; 2021 ? 14%

Diocese	
Dioceses Ineligible for grants or loans in 2020	
Albany	
Florida	
Rio Grande	
Springfield	

Diocese	Terms
Applications pending for 2021	
Colorado	
Easton	
Honduras	
Mississippi (no app on file)	11/30/2020

Budget

The Budget of \$20,000 was more than adequate to cover the cost of the committee’s work. Much of our work can be accomplished by Zoom. One or two face to face meetings and an opportunity to travel to dioceses in financial hardship would be a bonus.

Continuance recommendation

Since the waiver process is required by canon, The Assessment Review Committee should continue in the next triennium.

EXECUTIVE COUNCIL INVESTMENT COMMITTEE

Membership

The Rev. Andrew Walter, <i>Chair</i>	Washington, III	2021
Mr. John Talty, <i>Vice-Chair</i>	New York, II	2021
Mr. Dale Akinla	New York, II	2021
Ms. Marion Austin	San Joaquin, VIII	2021
Mr. N. Kurt Barnes	New York, II	
Ms. Janet Brown	California, VIII	2021
Mr. Gordon Fowler	Pennsylvania, III	2021
Ms. Holli Powell Sturm	Lexington, IV	2021
Mr. James Simon	Ohio, V	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

Executive Council By-Laws Article VIII Sec. 4

Joint Committees Created by the Executive Council

(a) Duties

- i. There shall be a Joint Investment Committee whose charter shall be adopted by the Council.
- ii. The Joint Investment Committee's charter shall be reviewed annually by the Joint Investment Committee and the Council and renewed annually by the Council.

(b) Membership and Term

- i. The Investment Committee shall consist of the Treasurer of the Council, along with at least six, but no more than nine additional members. At least one of the additional members shall be a member of Executive Council's Joint Standing Committee on Finances for Mission.

ii. Members of the Investment Committee shall be nominated jointly by the Chair and Vice Chair of the Council and elected by the Council.

iii. Members shall serve for a term of three years or until a successor has been elected. Members may serve two consecutive terms, after which three years must elapse before the member may be reelected.

Summary of Work

In accordance with Executive Council By-Laws, the Investment Committee has all the authority of the Council and Board of Directors of the Domestic and Foreign Missionary Society of the Protestant Episcopal Church (DFMS, or the Society) under the law to act on the investment and reinvestment of institutional funds or assets of The Episcopal Church, the General Convention, the Council, and the Society, as well as any other funds or assets held by the foregoing for investment.

The Investment Committee recommends investment objectives designed to provide a sustainable and increasing level of income to support the ministries of The Episcopal Church in accordance with the wishes of the donors or owners of those funds, while preserving the real (inflation-adjusted) purchasing power of the funds. It also develops and regularly updates Investment Policies that assist the Committee in effectively supervising, monitoring and evaluating the investment of the Endowment's assets.

The Committee establishes strategies and policies for the management of the investment portfolio, which includes the trust funds of the official corporation, the Domestic and Foreign Missionary Society of the Protestant Episcopal Church, and other Episcopal entities who wish to co-invest with the DFMS.

The portfolio is diversified and continues to be focused on equities, with approximately 63% invested in equities, 18% invested in fixed income, and 19% in hedge fund-of-funds and real estate. The Committee continues to evaluate the portfolio return while maximizing risk protection by reducing US equity allocation and increasing non-US equity and alternative investments.

Long-term performance of the trusts has been exceptional, with annual returns, after all fees and expenses, of 9.4% for the 10 years ending September 30, 2020. The current one (1) year net return ending September 30, 2020 reflects a 13.2% gain. Over the one (1), three (3) and five (5) year periods, the portfolio's performance has been ranked in the top fifteen (15) percent of foundations with assets between \$250 million and \$1 billion. Since inception of the portfolio in February of 1993, the

annualized net performance has been 8.7%. Since September 30, 2015, the market value of the portfolio has grown from \$346 million to \$518 million, as of September 30, 2020.

The DFMS endowment portfolio consists of the following three types of funds:

- Endowment funds, held and managed by DFMS and benefiting DFMS
- Funds owned and benefiting other Episcopal and Anglican entities in the United States and abroad, for which DFMS is the trustee
- Custodial funds held and managed by DFMS, but owned by and benefiting other Episcopal and Anglican entities in the United States and abroad

There are nearly 1,100 trust funds maintained in a common portfolio, managed by 15 investment managers and participating on a pro-rata basis in all returns of that portfolio. The Society is also trustee for 19 charitable trusts, which are separately invested and managed, but are not commingled with any other fund, as required by law. The Treasurer's Office publishes an annual trust fund book, and the Committee reports regularly to the Executive Council.

The Investment Committee continues to work closely with the Committee for Corporate Social Responsibility and the Economic Justice Loan Committee, with liaisons to each of those committees. The Investment Committee continues to be well-served by Mr. Kurt Barnes and a very dedicated staff from the Episcopal Church Center, as well as by our investment consultants at Mercer.

The Investment Committee meets four times each year to review performance and discuss current investment issues. The expenses of the Committee are charged to the income of the endowment.

EXECUTIVE COUNCIL ECONOMIC JUSTICE LOAN COMMITTEE

Membership

The Rev. Will Mebane, <i>Chair</i>	Massachusetts, I	2021
Mr. Timothy Gee	El Camino Real, VIII	2021
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2021
The Rev. Andrew Walter	Washington, III	2021
Mr. Warren Wong	California, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Paula Jackson (resigned 3/2020)	Southern Ohio, V	2021
Ms. Lindsey Parker (resigned 9/2019)	Massachusetts, I	2021

Representation at General Convention

The committee representatives at General Convention are Bishop Anne Hodges-Copple and Deputy Warren Wong.

Acknowledgements

Mr. Kurt Barnes, *DFMS Treasurer and Chief Financial Officer*
Ms. Margareth Crosnier de Bellaistre, *Director of Investment Management and Banking*
Mr. Tanie Oconer, *Assistant Controller*
Mrs. Nancy Caparulo, *Staff Liaison*
Mr. Casey Clark, *Corporate Social Responsibility Liaison*

Mandate

2015 - AN/FFM 007

The following is a true copy of a Resolution adopted by the Executive Council at its meeting from November 15-18, 2015 at which a quorum was present and voting. Resolved, That the Executive Council, meeting in Linthicum Heights from November 15-18, 2015, establish the Executive Council Economic Justice Loan Committee to be responsible for overseeing the assets set aside by General Convention and Executive Council for loans that support greater economic justice by enhancing people's ability to improve their economic well being and empowering the powerless and oppressed. The Economic Justice Loan Committee is to be made up of a minimum of five persons nominated by the Presiding Officers and appointed by the Executive Council, from the Investment Committee and Committee on Corporate Social Responsibility and other appropriate persons at large. The Committee will report on its work to Executive Council at least once annually through the Committee on Corporate Social Responsibility or the Investment Committee. Loan criteria are to be approved by Council.

Summary of Work

The Episcopal Church has committed \$7 million of its assets for economic justice initiatives around the globe and in the United States. The Executive Council Economic Justice Loan Committee (EJLC) administers this \$7 million in TEC endowment funds as a loan portfolio. The funds in the portfolio are used on a revolving basis to provide loans, indirectly, to organizations, institutions and individuals that may not qualify in the regular credit markets but have worthy community economic justice development programs and projects. The principal, upon repayment to TEC, is re-loaned by TEC to others. All the loans pay interest, and that interest income is used to support TEC's program budget.

During the 2019-2021 triennium, EJLC has met six times, and will continue to meet once each quarter, to review potential borrowers.

EJLC loans generally range in size from \$100,000 to \$300,000 and may be as large as \$500,000. EJLC makes no loan unless the appropriate diocesan bishop approves in advance. The most recent loan portfolio is posted on the Finance Office website at <https://episcopalchurch.org/fles/pi.july20.pdf>

The EJLC program does not lend directly to the end users of the funds but only to financial intermediaries such as community development loan funds or community development credit unions. These intermediaries, commonly called Community Development Financial Institutions

(CDFIs), themselves re-lend the monies provided by TEC to groups, organizations and individuals with needs to finance community economic justice development programs and projects. Many CDFIs operate in the United States, and many operate globally.

Examples of investments made through the program overseen by EJLC include:

- Support of community economic development in the Holy Land, TEC has made a \$500,000 deposit with the Bank of Palestine, earmarked by TEC for creating and supporting small businesses in the Palestinian community, especially businesses owned by women.
- Support of community economic development among Native Americans, TEC has made a \$200,000 loan to Four Directions Development Corporation(FDDC), a community development corporation organized and operated in Maine by the Passamaquoddy Tribe, the Penobscot Nation, the Houlton Band of Maliseet, and the Aroostook Band of Micmac. Principally, FDDC serves the community financial needs of members of these tribes and their families.
- Support of community economic development in South Africa, TEC has made a loan of \$300,000 to Shared Interest, a U.S. based fund that guarantees loans by South African banks to members of low-income communities in South Africa to enable them to construct houses, launch small businesses and create jobs.

Portfolio Composition and Risk Performance

The EJLC triennial period runs from January 1, 2019 through December 31, 2021. As of January 1, 2019, \$5,850,000 of the allocation was funded into 15 loans and two-term deposits with an average annual yield of 3.4%.

Through December 1, 2020, eight loans and two term deposits expired over the past 23 months totaling \$2,850,000 with an annual average yield of 3.3%. At the same time five new and two renewal loans plus a new term deposit were funded equal to \$2,550,000 at an average annual yield of 3.2%, while two new loans and a renewal totaling \$650,000 were approved and await year-end funding with a projected annual yield of 2.5%.

We anticipate \$6,200,000 of the \$7,000,000 EJLC portfolio allocation to be funded by December 31, 2020 at an annual average yield of 3.2% -- a rate that is reasonable relative to Treasury yields while providing below market rates to our borrowers.

EXECUTIVE COUNCIL COMMITTEE ON CORPORATE SOCIAL RESPONSIBILITY

Membership

The Rt. Rev. Douglas Fisher, <i>Chair</i>	Western Massachusetts, I	2021
The Rev. Canon Brian Grieves, <i>Vice-Chair</i>	Hawaii, VIII	2021
Mr. Casey Clark	New York, II	2021
The Very Rev. Mark Goodman	Rio Grande, VII	2021
Mr. Paul Neuhauser	Iowa, VI	2021
Ms. Diane Pollard	New York, II	2021
The Hon. Byron Rushing	Massachusetts, I	2021
The Rev. Kirsten Spalding	California, VIII	2021
The Rt. Rev. John Harvey Taylor	Los Angeles, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

The committee would like to acknowledge Ms. Janet Brown, the Liason to the Investment committee, as a regular participant in our meetings. The committee is indebted to Mercy Investment Services for its consulting expertise led by Ms. Pat Zerega and her team. The committee is also indebted to the Heartland Initiative for its guidance on implementing a human rights Investment screen and the Church's No Buy policy on military contracting. Volunteer consultant and past member of CCSR, Mr. William McKeown, Esq, provided many hours of support to the work of the committee, especially in implementing two 2018 General Convention resolutions, 2018-B007 on investing in gun manufacturers and 2018-B016 on developing a human rights investment screen relative to the Israeli/Palestinian conflict. The committee also salutes the Church Pension Group for its active involvement with CCSR in the areas of climate change, human trafficking and board diversity, and especially in joint work on 2018-C021 from the 2018 General Convention. Finally, last, but by no means least, the committee heartily thanks the Treasurer, Mr. Kurt Barnes, the Director of Management and Banking, Margareth Crosnier de Bellaistre, the Director of Government Relations, Ms. Rebecca Linder Blachly, and the staff of the General Convention Office for their unfailing staff assistance, without whom the committee simply could not function.

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Mandate

2015 - AN/FFM 008

Resolved, That the Executive Council, meeting in Linthicum Heights from November 15-18, 2015, establish the Executive Council Committee on Corporate Social Responsibility to be responsible for researching the social responsibility records of corporations whose stock is held in DFMS portfolios and recommending appropriate courses of action based on the positions established by General Convention and Executive Council. The procedures for this committee will be as follows: With the approval of Council, it will be responsible for developing shareholder resolutions on social justice issues to be submitted to companies in which the Church invests its funds. CCSR will also review similar resolutions being offered by other churches or advocacy groups and recommend whether the Episcopal Church should support them. These recommendations will be forwarded to the Executive Council through the Standing Committee on Advocacy and Networking. As new issues come up during the triennium, CCSR will forward its recommendations to the next meeting of Executive Council. Membership will consist of nine members, including at least one bishop, one priest or deacon and one lay person; one member of FFM, one member of the Investment Committee, and one member of A&N. Members will be nominated by the Presiding Officers of the Executive Council jointly and elected by Executive Council.

Summary of Work

CCSR is responsible for reviewing DFMS's investment portfolio and applying ethical criteria developed by the Church through its General Convention and Executive Council. This has been so over its 50 year history. The work of CCSR for the current triennium included corporate advocacy, reviewing of No Buy Lists (divestment), and three mandated assignments from the 2018 General Convention calling for development of a human rights investment screen, development of an investment plan in gun manufacturers and retailers, and a joint effort with the Church Pension Fund to advocate for climate expertise on corporate boards of directors. All are addressed in this summary of work.

Acronyms commonly used:

TEC: The Episcopal Church

DFMS: The Domestic And Foreign Missionary Society, the corporate entity that owns and manages property for TEC

CCSR: The Executive Council's Committee on Corporate Social Responsibility

ICCR: The Interfaith Center on Corporate Responsibility, the ecumenical and interfaith body of which TEC is a founding member. Most shareholder activity by CCSR is coordinated through ICCR

SEC: Securities and Exchange Commission which sets regulatory shareholder guidelines

ADVOCACY SHAREHOLDER ENGAGEMENTS

CCSR's advocacy work consisted of multiple engagement methods including company dialogues, filing shareholder resolutions, sending letters raising concerns, and participating in sign on letters. For the 2019 proxy year (July 2018 – June 2019), CCSR participated in 25 engagements at 23 different companies, including the filing of six shareholder resolutions, while in the 2020 proxy year (July 2019 – June 2020) there were 27 engagements at 25 different companies, and seven shareholder resolutions. For the 2021 season (July 2020-June 2021) there are 38 engagements among 36 companies and and potential for filing 8 shareholder resolutions as this report is written. This report provides a summary of activity for the 2019 and 2020 proxy years, and listing the companies engaged for 2021, including those actions taken on our behalf by Mercy Investment Services, Inc., our contractor for socially responsible advocacy efforts. CCSR resolutions are filed by the Domestic and Foreign Missionary Society (DFMS), the owner of the shares. The DFMS is the corporate entity that owns and manages property for the Episcopal Church, sometimes written as TEC. The subject areas of engagement as described below are Human Rights, Health and Safety, Care of Creation and Corporate Governance and Accountability (Board Diversity).

COVID-19 Impact on Engagements in 2020 Onward

With the beginning of the COVID-19 pandemic in early March 2020, the “normal” proxy year as well as everyone’s “normal” world shifted. Face-to-face meetings with companies shifted to video format, conferences were cancelled, and discussions began on how to engage with companies on this new and continually evolving topic. Various industry and/or topical subgroups within ICCR developed targeted COVID letters specific to that area. In addition, ICCR developed two COVID-19 investor statements, one that called on the business community to step up as corporate citizens, and recommending measures corporations can take to protect their work forces, communities, businesses and markets as a whole. Another letter was on best practice guidelines for virtual annual general meetings (AGMs) and investor rights. In addition, dialogues were often postponed as companies dealt with the immediacy of the COVID crisis for their business, and dialogues that did continue often included a change of focus, shifting to issues surrounding the pandemic.

Impact of Securities and Exchange Commission New Rules (September 2020) on Advocacy Processes

On September 23, 2020, the Securities and Exchange Commission (SEC) announced new rules regarding regulation of DEF14(a)8, which governs shareholder resolutions submitted to companies. The new regulations impose severe limitations on shareholder rights, and CCSR, through the Interfaith Center on Corporate Responsibility, and our Office of Government Relations have written to the SEC expressing opposition to certain changes. This will be an ongoing area of advocacy for CCSR.

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Human Rights

<i>Objective – Sex and Labor Trafficking</i>	<i>The Episcopal Church (TEC) Policy</i>
Engage travel companies such as hotel, airline and trucking companies on compliance with best practice standards to mitigate labor trafficking, and child and women sexual trafficking.	Resolutions: ○ 2012-D042 Fight Human Trafficking ○ 2009-A167 Support Actions to Protect Victims of Human Trafficking ○ 2018-C032 Against Human Trafficking and support Code of Conduct for the Protection from Sexual Exploitation in Travel and Tourism” adopted by ECPAT (End Child Prostitution and Trafficking)

Delta Airlines

Delta Airlines continues its multi-year efforts in bringing awareness to the issue of human trafficking. In 2019, it began using End Child Prostitution and Trafficking (ECPAT) training with its employees, training 61,000 staff. Two Delta employees who had received training won the ECPAT 2019 Rescue Award for knowing the signs of trafficking and responding as trained. The company also launched an in-seat video on its aircraft about human trafficking. In 2020, Delta received COVID-19 related letters from the Interfaith Center on Corporate Responsibility (ICCR), our ecumenical partner. No response received as of this report.

Marriott International

In 2019, Marriott joined a Sourcing Freedom event in Washington, D.C., where trafficking and Marriott’s response was discussed. The human trafficking training policy approved in 2018, including all properties, was rolled out with training implemented across the system. This made Marriott the first chain to train in all franchise operations. In addition, the hotel launched its first PSA focused on trafficking. Marriott reported that since the Starwood merger, 1/2 million staff have been trained. Marriott earned ECPAT’s 2019 Visionary Award for its training efforts. At the urging of shareholders, Marriott publicly stated it would refrain from using its hotels for hosting families taken by ICE officials in immigration raids. In 2020, Marriott supported the ECPAT training guide for legislators, a resource guide encouraging legislators to have public conversations in their districts on human trafficking and followed up by co-hosting a sample training that 100 Congressional staff attended. Investors sent an email in March 2020 regarding news reports of several major hotel chains, including Marriott, being sued for alleged inaction to stop human trafficking occurring on their premises. Investors asked the company to provide information on how it is addressing the issues raised by the lawsuits, including evaluating any gaps in its processes to identify and report instances of trafficking. The COVID-19 communication sent also highlighted the potential risk for increased instances of human trafficking resulting from high economic stress and unemployment and asked how the

company will work to strengthen its trafficking prevention efforts. Staff changes and COVID-19 have slowed company responses.

United Airlines

United reported training all flight attendants on human trafficking (54,000) in 2019 and noted employees were raising suspected cases appropriately. On labor trafficking, contracts with high-risk suppliers now contain language with 'no fees' and the company reported there was a process for restoring recruitment fees. After the company did not respond to several requests for dialogue in 2020, DFMS (Episcopal Church’s corporate name), and ICCR partners filed a resolution requesting a report assessing the feasibility of integrating objective sustainability metrics into performance measures, performance goals or vesting conditions that may apply to senior executives under United’s compensation incentive plans. Sustainability is defined as how environmental and social considerations, and related financial impacts are integrated into corporate strategy over the long term. In a call, investors discussed concerns about the company's management and oversight of Environmental, Social and Governance (ESG) risks. Company agreed to continue dialogue and discuss ESG metrics further and stated its compensation and nominating/governance committees would further review investors’ proposal and recommendations. Investors withdrew the proposal with this commitment. At the annual general meeting, investors asked how the company plans to continue efforts to reduce its emissions as it works to recover from the current drop in business due to the COVID-19 pandemic. CEO Scott Kirby noted his personal commitment to sustainability and his belief that customers will prioritize sustainability following the universal experience of the pandemic. The company announced in early July 2020, it plans to lay off up to 36,000 U.S. employees in October.

<i>Objective – Human Rights</i>	<i>TEC Policy</i>
<p>Engage companies on efforts to ensure compliance with human rights standards in their own workforce, supply chains, including outsourced labor brokers, requirements in subcontractor contracts, compliance audits and performance /improvement measurement.</p>	<p>Resolutions:</p> <ul style="list-style-type: none"> ○ A994-D015 Reaffirm Support for Human Rights: “civil rights and political freedom are the universal bedrock of any meaningful scheme of human rights” ○ A2012-A012 Urge Governments to Follow Principles in Adopting Trade Polices: “That trade should respect and enrich rather than undermine local economies, cultures and peoples”. ○ A2012-A131 Express Solidarity with Indigenous Peoples: “make protection of the rights of Indigenous Peoples a high priority in its advocacy about United States foreign policy, including advocacy about trade agreements, human rights advocacy, and international environmental protection” ○ A2018-B026 Embracing the United Nations Sustainable Development Goals

Kraft Heinz

In 2019, a letter was sent to the company calling out poor scores in the Corporate Human Rights Benchmark and Know the Chain reports. Investors decided to file a resolution on human rights and forced labor. DFMS co-filed the resolution which requested the board of directors report on the company’s process of identifying and analyzing potential and actual human rights risks in operations and its supply chain. The company responded with a call to discuss the resolution and provide information on its plans to address human rights concerns. It planned to release a standalone human rights policy in 2019 and was looking to stakeholders for examples of best practices/case studies. Because of this forward movement, the resolution was withdrawn. The company planned to look at specific commodities, auditing processes, and processes for remediation. Materiality analysis was reported in the recent corporate social responsibility report and the company planned to conduct saliency assessment before completion of the human rights policy. In June 2019, the company adopted and publicly shared its human rights policy, which outline the guiding principles the company will follow to respect human rights, the scope of the policy, how it will be administered and who has oversight, and the components of human rights due diligence that the company will implement. DFMS was represented by Mercy Investments at the AGM in Fall 2019 and made a statement on behalf of investors who filed and later withdrew the human rights resolution. Following the AGM, investors had a call which included the topic of the company's work on addressing human rights risks. The company reported that it had met with Elevate and planned to hire the organization for assistance in conducting a human rights risk assessment. Kraft Heinz noted that Elevate will provide the assessment and recommended actions by the end of 2019 and the company will follow it up with training for managers and suppliers. The company agreed to schedule a follow-up call with investors in early 2020 to discuss the findings of the human rights impact assessment, but investors have been unable to secure a date from the company.

<i>Objective – Israel/Palestine</i>	<i>TEC Policy</i>
Engage companies operating in areas of civil and/or labor strife or racial disparagement (e.g., Democratic Republic of Congo, Israel/Palestine, Peru, Indonesia, and U.S.) on due diligence processes and/or enhancing their capacity to deal with potential human rights violations, in either case to help assure they are not directly or indirectly financially benefiting armed groups or engaged in repressive practices impacting indigenous peoples. Develop Human Rights Screen for Israel/Palestine and all occupied areas as well as areas of conflict.	General Convention Resolutions: ○Á 2018-B016 Join ELCA and Develop Human Rights Screen in Israel/Palestine conflict ○Á 2018-Do68 Develop Procedures for deciding to engage or establish No Buy List (divest) from companies ○Á 2003-D008 Urge Israel to End Policy of Demolition of Palestinian Homes ○Á 2003-Do81 Oppose Construction of the Israeli Security Wall ○Á 1997-A107 Recognize Jerusalem as the Capital of Both Israel and Palestine ○Á 1994-Do65 Recognize Illegality of Israeli Settlements in Gaza and the West Bank

Bookings Holdings

Work began with the company in 2018 when a letter was sent requesting information on how the company identifies and manages human rights risk in its supply chain, specifically with respect to its rental properties in Israeli settlements in the West Bank. It also requested the opportunity to meet to discuss these issues. In response to the AirBnB announcement that it would remove listings from Israeli settlements, Bookings signaled it would not follow the example by saying “all accommodation providers worldwide to list on our platform as long as they are in compliance with applicable laws.” DFMS filed a resolution in December 2018 asking the company to assess and report to shareholders on the company’s policies and procedures to address the human rights-related risks associated with business activities in conflict-affected areas, including occupied territories. Company met with shareholders on developing a conflict zone human rights policy. It indicated it was a fast-growing company that had been decentralized by product and was just starting to look at establishing a set of principles. The lead filer withdrew the resolution and in exchange, the company agreed to convene an investor meeting with CEO Fogel and representatives of Booking Holdings and Booking.com. There it was announced that the company had selected BSR to assist in crafting a global human rights policy. The selection of BSR, the ambitious timeline of their compliance officer, and the enthusiastic participation of Fogel, demonstrate a seeming seriousness of intent. If the company successfully develops a robust global human rights policy, with particular attention paid to conflict-affected areas, it would establish itself as the industry leader (based on the weak/non-existent policies of its competitors). In April 2020, investors met with company to get an update on the status of the policy. The company does feel it will come out on the other side of the pandemic, but did lose 85% of its business from the prior year. As for human rights, BSR was engaged to do a scan of human rights risk. Following its report, a draft has been written and is being vetted at each of the business units. There was no resistance, but it is a slow process due to the impact of the virus. Company committed to share a draft with the group for input. Board knows of project but has not signed off on it yet. In September 2020, again reviewed with the company the current status of its policy for conflict areas. It did see conflict areas as high risk and was developing plans for how to address. The company did not commit to leaving these areas. The company hoped to have a full policy by December 2020.

Caterpillar, Israel Discount Bank, Motorola Solutions

DFMS filed a shareholder proposal in December 2018 requesting Caterpillar assess and report to shareholders on the company’s approach to mitigating the risks associated with business activities in conflict-affected areas other than areas already addressed through its conflict minerals policy. A dialogue with the company after the filing focused on human rights impact assessments (HRIA) and investors asked for more disclosure and information on how it is looking at conflict-affected areas in its HRIsAs, but the company refused. The resolution went to vote and received 7.8% votes in favor, sufficient to continue shareholder future filings. Israel Discount Bank did not respond to a request to meet in 2018/2019 after initially agreeing to do so. The bank is a major investor in Israeli settlements.

Motorola Solutions does business in countries with human rights challenges including China, Singapore, Middle East, Israel and occupied Palestinian territories. Human rights expertise at both management and board levels is critical to company success. DFMS filed a resolution with the company in November 2018 requesting it to identify and nominate an independent director with human rights expertise. The resolution received 8.87% votes in favor, sufficient to refile the resolution again.

In October 2019, the Executive Council, having noted CCSR's evaluation of its efforts over multiple years to engage with multiple companies in the Domestic and Foreign Missionary Society portfolio, and in order to implement Executive Council's Finance Committee's resolution (FIN-061), "directs that Caterpillar Inc., Motorola Solutions and the Israel Discount Bank be, and they hereby are, placed on the DFMS Human Rights No Buy List, and Council further hereby directs DFMS's money managers to sell DFMS's holdings in these companies." See further explanation below in the B016 resolution from the 2018 General Convention.

Facebook

The original work by the lead filer on this issue, begun in proxy year 2019, changed to work on gender pay gaps and diversity. CCSR continues to monitor Facebook for human rights implications and other ethical behavior.

TripAdvisor

DFMS, as primary filer, filed a resolution in December 2018 requesting TripAdvisor assess and report to shareholders on the company's policies and procedures to address the human rights-related risks associated with business activities in conflict-affected areas, including occupied territories. Shareholders met with the company to discuss policies in conflict zones. Company was closely watching what was going on with AirBnB for the impact of its decisions, but was open to working with investors on developing a policy for conflict zones. After discussion among the shareholders, it was decided to withdraw the resolution as the company had agreed to look at additional actions it can take concerning conflict zones and would continue to meet with shareholders. Met with company in August 2019 concerning movement on business activities in conflict areas. It had decided to do a materiality risk assessment to better understand the social issues important to them using FLAG, a British company. It also moved the fraud team from the hotel unit to the legal unit to address not only trust and safety, but global issues. Company agreed that investors could address both groups. FLAG has contacted investors for input into the materiality assessment and comments were made on definitions, saliency of some of the issues they were looking into. CCSR pushed for them to define how they were going to suggest TripAdvisor address material risks to the business and on how they were moving forward, which seems to be desktop research and local stakeholders. No plans that people impacted in conflict zones will be interviewed. Company did not respond to a request for another call. Subsequently, two meetings were held with TA in 2020, and the company's progress was anemic. As this report is written, a DFMS shareholder resolution will be filed with the

company calling for a broad global human rights policy. CCSR will pay special attention to Myanmar, the OPT (advertising in Israeli settlements) and Sudan.

Booz Allen Hamilton (BAH)

Booz Allen Hamilton was a new engagement for proxy year 2020. An initial inquiry letter was sent expressing concern over the company's potential involvement in human rights violations carried out domestically by the Kingdom of Saudi Arabia's security services and in Yemen by the Kingdom's military and requested a dialogue with BAH. The letter covered the topics of reports that BAH, as part of its contract with the government of Saudi Arabia, had assisted in training Saudi sailors who participated in the blockade of Yemen, which faced mass starvation and cholera outbreaks. In addition, it noted that although the murder of Washington Post journalist Jamal Khashoggi "prompted investors from around the globe to distance themselves from the Saudi government, BAH and its competitors McKinsey & Company and Boston Consulting Group have stayed close after playing critical roles in Prince Mohammed [bin Salman]'s drive to consolidate power." Company responded with a letter saying it is aligned with U.S. foreign policy and actions are consistent with its code of business conduct, but expressed no willingness to meet. BAH is a candidate for TEC's human rights and military contracting No Buy Lists.

HeidelbergCement AG

HeidelbergCement AG was also a new engagement for proxy year 2020. Heidelberg is one of the world's largest building materials companies. The objective of the engagement was for the company to conduct advanced due diligence and report to shareholders on heightened risks related to business activities in conflict-affected areas. Heidelberg was active in several such areas including, but not limited to, Democratic Republic of Congo, Myanmar, Occupied Palestinian Territory, Ukraine, and Western Sahara. The company's activities have come under increased scrutiny from a variety of investors, multilateral institutions, and national and international human rights organizations. DFMS was invited to join the engagement by Wespeth, involving correspondence and meetings with Heidelberg. Lead firm had staff changes that prevented further addressing this issue in proxy year 2020. A new letter of engagement is being prepared as well as a call with Indonesians who have been impacted by Heidelberg.

Advocacy Letters to Banks on Aramco

Letters were sent to **Citigroup, Goldman Sachs, JPMorgan Chase, and Morgan Stanley** in 2020 regarding the banks planned participation in the underwriting of the initial public offering (IPO) of shares of Saudi Arabian Oil Company (Aramco). Concerns focused on the abysmal human rights record of the government of the Kingdom of Saudi Arabia and requested the banks to provide a copy of their human rights/social responsibility policy and an explanation of how engagement in the IPO is consistent with that policy with respect to press freedom, religious freedom, gender equity, and compliance with the laws of warfare. Aramco qualifies for TEC's Fossil Fuels No Buy List, and at the recommendation of CCSR, Executive Council has added it to the Human Rights No Buy list.

Health and Health Care

<i>Objective – Gun Safety</i>	<i>TEC Policy</i>
<p>As a public health issue, engage gun manufacturers to adopt more smart technologies for weapons and retailers to restrict which weapons they sell and under what conditions; engage both to adopt the Sandy Hook Principles, which protect the rights of gun ownership and the rights of citizens to be safe and secure; and to report on their lobbying activities and expenses for gun rights.</p>	<p>2018 B007 Ethical investing in gun manufacturers.</p> <ul style="list-style-type: none"> ○ Resolved, the House of Bishops concurring, that the 79th General Convention direct the Executive Council Committee on Corporate Social Responsibility to develop and implement a shareholder engagement plan by which dioceses, church organizations, and individual Episcopalians investing in the publicly traded stock of gun manufacturers and retailers could act to effect change in these companies through the practices of shareholder advocacy to do everything in their power to minimize lethal and criminal uses of their products, and be it further ○ Resolved, that the 79th General Convention commend to the church the Mosbacher-Bennett Principles for Investors in the Gun Industry developed by Do Not Stand Idly By. ○ 2015 C005 – Implement Laws to Decrease Gun Violence ○ 2000 B007 - Request removal of handguns and assault weapons ○ 1997 D033 - Urge Legislation on the Safe Manufacture of Domestic Hand Guns ○ 1976 C052 - Urge Congress to Adopt Effective Hand Gun Control Legislation

American Outdoor Brands Corporation/ Smith and Wesson

At American Outdoor Brands’ September 2018 annual general meeting, ICCR partners’ resolution requesting a report on the company activities related to gun safety measures received a majority vote of 52.16%. In early February 2019, the company published the requested report, which shareholders found to be lacking. Partners filed a resolution for the 2019 proxy year asking the board of directors to adopt a proxy access bylaw, but the board approved certain amendments to the company's bylaws to implement proxy access for the election of directors, so the resolution was withdrawn. Late in 2019 American Outdoor Brands spun off the gun manufacturing business to become Smith & Wesson Brands, Inc. For the 2020 proxy year, a resolution was filed requesting the board of directors adopt a comprehensive policy articulating its commitment to respect human rights, which includes a description of proposed due diligence processes to identify, assess, prevent and mitigate actual and potential adverse human rights impacts. The company filed a no action letter with the SEC, which was denied, so the proposal was going to appear on the 2020 proxy and voted on at the October 2020 annual general meeting. In early October, however, the company developed a Corporate Stewardship Policy which investors believed was a good faith response by the company to engage with shareholders and their concerns. The resolution was then withdrawn before the AGM.

Dick's Sporting Goods

Company announced plans in 2018 to remove all guns from 125 of its stores. Investors sent a letter thanking the CEO for this decision. Dick's CEO, along with 144 other CEOs, signed a letter in September 2019 to the U.S. Senate pressing for the adoption of commonsense gun legislation, including requiring background checks on all gun sales and implementing a strong Red Flag law to prevent individuals who may pose significant harm to themselves or others from owning firearms. Another letter of appreciation was sent to Dick's regarding the company's continued leadership on the issue of gun safety, including removing and safely destroying \$5 million of the company's gun inventory, raising the minimum firearm purchase age to 21, and strategically reviewing the long-term sustainability of the firearms business for the company. In March 2020, Dick's announced it planned to pull guns from an additional 440 stores. Investors again sent a note to the company thanking it for its ongoing leadership and requested a dialogue to discuss the company's actions in more detail. In June 2020, an email was sent to Dick's regarding the recent opening of some warehouse, or 'pop-up' stores asking whether the company planned to sell firearms or ammunition at these locations. Also asked for an update on the implementation of its March announcement to phase out the sale of firearms at the additional 440 stores. Although a meeting on this issue has not yet occurred, the company was sent a letter thanking them for removing merchandise of the Washington Football Team and the offensive mascot from their stores.

Olin Corporation

An introductory letter was sent to company in the 2019 proxy year asking for a dialogue around addressing gun violence, making gun products safer and learning about what types of political activities the company engages in. No response was received. Following up on the introductory letter, for the 2020 proxy year DFMS acted as lead filer submitting a resolution in November 2019 asking the company to produce a report on its efforts to address safety concerns in the firearms industry and how it mitigated those risks. The company shared information about its ammunition business with investors as well its efforts to address the issue of gun violence. The company released its first corporate social responsibility (CSR) report that addressed sustainability issues and also included a separate CSR report for the Winchester ammunition portion of the company. The resolution was withdrawn based on agreement that the company would review and consider investors' written feedback and recommendations on how the company's reporting can be improved going forward.

Sturm Ruger

ICCR partners filed a resolution in the 2019 proxy year with Sturm Ruger, regarding adopting a comprehensive policy articulating the company's respect for and commitment to human rights. The company, unbeknownst to shareholders, had changed its bylaws during the summer and moved its reporting year, thus its deadline for filing resolutions moved from February to November. As a result,

all resolutions submitted by ICCR partners to Sturm Ruger did not meet the deadline for filing and were withdrawn on this technicality. In early February 2019, the company also released its report requested from the previous year's majority-approved resolution. Shareholders did not feel the report was comprehensive and some ICCR members filed an exempt solicitation against the election of some of the nominated board of directors. ISS recommended voting in favor of the exempt solicitation and of the directors identified. Three received 28% of the vote against their election. Two ICCR members also attended the AGM and spoke with board members and senior leadership after the meeting. They noted the CEO indicated the company may make revisions to its policy for engaging shareholders, but there was a concern the revisions may favor larger investors. An ICCR partner sent a letter in October 2019 to Sturm Ruger requesting a dialogue and an update on the company's review of its shareholder engagement policy. The letter noted the gun safety report the company issued and the ongoing concerns investors had, as well as the company's review of its policy regarding direct shareholder engagement. ICCR partners followed up by filing a resolution requesting Sturm Ruger publish a report with the results of a Human Rights Impact Assessment examining the actual and potential human rights impacts of Sturm Ruger firearms sold to civilians. Sturm Ruger filed a challenge to exclude the shareholder proposal with the SEC. The resolution was withdrawn to avoid a negative decision and an omission ruling from the SEC. Investors participated in the virtual AGM asking questions on gun safety.

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<i>Objective –Rights of Indigenous Cultures and Communities</i>	<i>TEC Policy</i>
<p>Engage financial institutions to ensure policies address socioeconomic and environmental concerns, particularly climate and fresh water resources, as well as pipeline financing in their lending practices. In addition, engage asset managers on their proxy voting practices.</p>	<p>Human Rights Resolutions:</p> <ul style="list-style-type: none"> oÁ1994-D015 Reaffirm Support for Human Rights: “civil rights and political freedom are the universal bedrock of any meaningful scheme of human rights” oÁ2012-A012 Urge Governments to Follow Principles in Adopting Trade Polices: “That trade should respect and enrich rather than undermine local economies, cultures and peoples”. oÁ2012-A131 Express Solidarity with Indigenous Peoples: “make protection of the rights of Indigenous Peoples a high priority in its advocacy about United States foreign policy, including advocacy about trade agreements, human rights advocacy, and international environmental protection” oÁ2018-B026 Embracing the United Nations Sustainable Development Goals <p>Environmental Protection of local communities, including Indigenous peoples resolutions:</p> <ul style="list-style-type: none"> oÁ2012-B023 Seek Environmental Justice oÁ2015-C013 Oppose Environmental Racism oÁThe Executive Council resolutions on the Dakota Access pipeline relate to support for the protest oÁEXC102016.29 Support for Peaceful Protest at Standing Rock Sioux Reservation

Wells Fargo

In the 2019 proxy year, work with this company focused on development of a business standards policy. This mainly addressed the problems encountered in the mortgage section of the company. The meeting held in December 2019 reviewed the business standards document which was started in 2017. Group was given an hour to read and respond with feedback, including: the concept of making it right for customers and that remediation is still not strong enough, metrics of change needed, and what will be success is still not defined. Investors issued a press release after the publication of Wells Fargo's Business Standard Report, noting the progress the company has made since the 2017 shareholder proposal. Investors also highlighted continued gaps including: the need for disclosure of metrics it developed to track progress in remediating harm; more information on how it will integrate employee conduct risk metrics into executive compensation/incentive plans; and need for justice regarding the company's mishandling of homeowner loan modifications, car insurance, etc. Follow-up call sought acknowledgement of harm the company caused with its practices, an analysis

of what led to lapses in problematic practices and disclosure of progress, especially metrics, in evaluating changes being made.

During dialogues, lending on issues of prisons, pipelines and gun manufacturers were discussed. Wells issued a \$40 million line of credit to gun manufacturer Sturm Ruger in October and as a result, ICCR partners issued a statement saying this was “shocking news due to ongoing dialogue efforts.” In a late-spring call, it was reported that the environmental and social risk policy has been implemented and these relationships have been reviewed. It was reported that Wells is no longer funding private prisons. Investors asked company to be more proactive in talking about human rights assessments on its website and reports. ICCR team sent a follow-up letter to Wells Fargo after the company released its progress report on the Business Standards Review thanking it for its progress and outlining additional recommendations for strengthening the review process and the company's disclosure. Wells Fargo published a progress report on the implementation and status of internal changes underway, mentioning the input of ICCR.

Care of Creation

<i>Objective – Water and Healthy Communities</i>	<i>TEC Policy</i>
Engage companies on science-based water stewardship targets and the human right to water, in their operations and their supply chains.	Water and healthy communities resolutions: <ul style="list-style-type: none"> o 2015-C053 Support Subsistence Rights of Indigenous Cultures o 2018-B026 Embracing the United Nations Sustainable Development Goals

Bayer

A December 2019 call with Bayer discussed its 2030 commitments on sustainability, transparency, and engagement. To reduce the company's environmental impact 30% by 2030, Bayer is working to scale down volume use of crop protection products through precise application methods, development of more effective agrochemical products, and promotion of integrated weed management. In addition, it has been training employees on water monitoring and farmers on water efficiency and conservation. A second call discussed progress on its 2030 sustainability commitments. It has trained 1 million smallholder farmers, focusing on markets where there are weaker regulations or no certification programs, and through contractor CropLife International has trained 4 million farmers in 82 countries on sustainable agriculture and responsible pesticide use. This includes training programs in Vietnam, West Africa, Honduras, India and Ethiopia. Bayer plans to use two external models to help measure the human and ecotoxicological impact of chemicals and was establishing the baseline data. Its sustainability council is totally independent and was developing an action plan for how it will operate, report to the board, and the topics on which it will focus. Bayer's commitment to have water management systems at all sites in water-scarce or high-risk areas is 95% complete, and it expects to reach 100% by the end of 2020. Bayer announced that it reached an

agreement in the glyphosate (Roundup) litigation and will settle approximately 75% of those cases with a payout of between \$8.8 - \$9.6 billion.

Coca-Cola

In proxy year 2020, the company was working to set new targets for water sustainability to replace those expiring in 2020, building on its successful Replenish program, which in 2019 resulted in 160% of water withdrawn for its products and operations being replenished. The new goals will address more localized water risks and opportunities and focus on higher risk water basins.

Corteva Agriscience

During proxy year 2020, the company reported on use of its Enlist products under the agreement with ICCR, noting that despite expanded use of the product, reports of misuse and drift of product were low. It issued its 2030 sustainability goals and the goals include commitments to provide training to 25 million farmers on soil health and water stewardship; increase the productivity and income of 500 million smallholder farmers; enable crop yields while reducing greenhouse gas emissions by 20%; improve soil health on 30 million hectares and advance water stewardship; enhance biodiversity on more than 10 million hectares; protect health and safety of employees and farmworkers; empower women and engage local communities; require sustainability criteria for all new products; establish a climate strategy for scope 1-3 emissions; and use sustainable packaging.

Anadarko Petroleum/Occidental Petroleum

Anadarko Petroleum was acquired by Occidental Petroleum in 2019. During the year the company continued to make progress toward meeting investor requests, including enhancing its disclosures. Investors reviewed where the new company falls on the issue of fracking and its ranking in Disclosing the Facts in relation to its peers and plans to determine next steps.

Chevron

Company responded to a letter in proxy year 2019 concerning the human right to water and water disclosure, indicating it had some procedures for water management and Sustainable Development Goal #6, but it didn't address the core components of an action plan on the human right to water. A follow-up call with the company included discussion on how it manages water risk in its operations, how the company could improve its water disclosures, and investors urged the company to use a human rights lens to look at its impacts on water. Along with ICCR partners, DFMS filed a resolution in December 2019 requesting Chevron's Board of Directors report on the company's due diligence process to identify and address risks related to the human right to water throughout its operations. Chevron did not challenge the resolution and the vote was 32.2% in favor

PepsiCo

Investors had a call with PepsiCo in proxy year 2019 and addressed the following issues: 1) recent developments/litigation around glyphosate (Roundup) haven't created a 'tipping point' for company to set reduction targets for glyphosate use, but company will update its pesticide statement; 2) Pepsi was limited in tracking pesticide use/reduction because supplier farmers self-assess and if the farmer was audited by a third party, the company doesn't see much of the data; 3) company felt Field-to-Market was a helpful tool and was open to investors helping develop farmer survey tool; 4) it was implementing a Sustainable Farming Initiative (SFI) with direct crop farmers; 5) investors pushed Pepsi for disclosure of more data/quantitative measures to demonstrate products are 'sustainably sourced.'

ICCR partners filed a resolution requesting a report on reducing the company's environmental impact by describing actions taken and lessons learned to date in quest of the 50% beverage container recycling goal, and report on progress in developing revised plans for meeting its commitment to leadership actions to help increase U.S. container recycling rates. The company was participating in multiple activities on this topic and agreed to continued engagement with shareholders, so the resolution was withdrawn.

Investors had a follow-up call regarding plastic pollution in December 2018. PepsiCo had launched its "Sustainability from the Start" program where sustainability goals and key performance indicators were embedded into product development and design. Company set a goal that all packaging would be recyclable/compostable/biodegradable by 2025. It looked to switch to compostable/biodegradable materials for emerging markets because of faster break down if littered/discharged of improperly, and it was working to redesign chip bags/food packaging to be recyclable. Company planned to continue to use light-weighting and other optimization techniques, but was not prepared to set an overall plastic reduction goal.

An in-person meeting between PepsiCo and ICCR investor members in November 2019 concerning the company's environmental sustainability programs, specifically pesticide use. Sustainability metrics had been tied to executive compensation and a governance committee provides oversight and reports to the board. On pesticides, company used Demo Farms to share different farming practices, including responsible use of pesticides. Promoted use of pollinator buffer zones with its growers/suppliers but didn't measure pollinator health or target certain types of pesticides for reduction. Pepsi agreed systemic pesticide use was incompatible with integrated pest management, but it wasn't sure what implementation would look like if it adopted a pesticide reduction policy. The company agreed to look at its pesticide statement again and indicated there may be policy changes in 2020. Also addressed some human rights and labor issues, including the use of migrant labor in U.S. and impact of the immigration crisis. In June 2020, the company released its 2019 Sustainability Report that included updates on its efforts to reduce plastic pollution and redesign packaging to be more circular. In the report, PepsiCo noted that it has reached 88% completion of its goal to make all packaging recyclable, compostable, or biodegradable by 2025. The company pledged \$65 million between 2018-2020 to help advance global recycling and collection efforts, and set a new goal in 2019 to achieve a 35% reduction rate of virgin plastic across its beverage portfolio by 2025. The

company still has progress to make on a number of its commitments, including increasing the recycled content of its plastic packaging to 25% by 2025, which was currently at 4% recycled content. Letter was sent by investors in June 2020 to urge the company terminate its business and public relationships with the National Football League’s (NFL) Washington D.C. franchise if it does not stop using the name “Redskins.”

<i>Objective – Climate Change and a Healthy Environment</i>	<i>TEC Policy</i>
<p>Engage companies to adopt science-based targets for reducing greenhouse gas emissions, adopt technologies to monitor and reduce methane emissions, adopt new and cleaner energy technologies, promote efficiency, promote transparency in reporting, and protect consumers, particularly low-income consumers. Engage companies, particularly in the energy and utility sector, to improve public disclosure and transparency in reporting presented by current and future company operations and products including company plans to manage carbon asset risk and comply with a regulatory scenario that holds global temperature rise below a 1.5/2-degree Celsius threshold.</p>	<p>Climate Change and a Healthy Environment Resolutions</p> <ul style="list-style-type: none"> oÁ 2015-A170 Advocate for Safe Food Production and Farm Labor Policie: “support public policies and laws designed to protect our Earth’s natural environment and to protect humanity’s ability to produce food for generations to come, including restrictions on pesticide overuse, harmful industrial farming practices (e.g., overcrowding of livestock and mono-cropping), and carbon, methane, and nitrogen pollution throughout the food system that threaten animal and human health, damage the soil, and threaten the climate for future generations.” oÁ 2009-C011 Directs Advocacy on Renewable Energy and Environmental Stewardship <p>On GMOs, there was a resolution to study GMOs, and then a resolution that was rejected in 2015 so I would urge a great deal of caution around any engagement with GMOs.</p> <ul style="list-style-type: none"> oÁ 2015-B006 On the Topic of Affirming Genetic Engineering Technologies - Legislative Action Taken: Rejected oÁ The 2009 resolution urges further study, but has no recommendation: 2012-A013 Study the Impact of Genetically Modified Crops and Organisms oÁ 2018-C021 Advocate for sustainability expertise on corporate boards of directors2018-A020 Fossil Fuel divestment and reinvestment in clean renewable energy oÁ 2018-B026 Embracing the United Nations Sustainable Development Goals

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Ameren

Ameren issued a report in 2018, *Our Responsible Management of Coal Combustion Residuals*, in response to the 2017 shareholder resolution. Investors noted the report has gaps and discrepancies. Ameren responded with a brief letter stating the company's coal ash report was rigorously reviewed by senior management, the board, and legal counsel, and felt it directly and sufficiently addressed the asks of the shareholder proposal. Investors attended the annual shareholder meeting where Ameren reported on its sustainability efforts, including its commitment to reduce carbon emissions 80% by 2050 based on 2005 levels and its plan to generate 700 megawatts of wind power by 2020. A call with Ameren's sustainability staff in July 2019 discussed its ongoing update of the integrated resource plan, which is a roadmap that large utilities use to plan out generational acquisitions over five, 10, or 20 years (or more). Investors raised concerns on the company's slow phaseout of coal compared to peers, with the shortfall in its long-range emissions target, and with the company's plans to invest in natural gas generation over renewables. The company noted that its new integrated resource plan will address some of these concerns. It was also working to align its executive compensation structure with its greenhouse gas targets. Ameren reported in its 2020 proxy statement that its nuclear, operations and environmental sustainability committee of the board of directors oversees and reviews the company's operations, with responsibilities expanded to include oversight of the company's risks, policies, and performance related to environmental sustainability matters, including those related to climate change and water resource management.

Chevron

ExxonMobil, Chevron and Occidental announced joining the Oil and Gas Climate Initiative (OGCI) in September 2018. OGCI — founded in 2014 — already lists 10 international oil giants as members, including BP, Royal Dutch Shell and several national oil companies. OGCI aims to speed initiatives at individual companies and to reduce emissions of carbon and methane, a particularly potent greenhouse gas. Several of its existing members and new initiates — including Exxon, BP and, most recently, Shell — have launched efforts to reduce methane emissions from their oil and gas operations. Members of OGCI also contribute to a \$1 billion investment fund, launched in 2016, to support low emissions technology. Climate Action 100 lead gave an update on the engagement in December 2018, noting that in addition to joining OGCI, the company signed the Methane Guiding Principles, and made a significant investment in electric vehicle charging network Chargepoint. ICCR partners filed a resolution requesting that Chevron issue a report on how it can reduce its carbon footprint in alignment with greenhouse gas reductions necessary to achieve the Paris Agreement's goal of maintaining global warming well below 2 degrees Celsius. The vote was 32.3% in favor. An April 2019 meeting with the company discussed its new climate risk report update that included governance and emissions reporting in line with the Task Force for Climate-Related Financial Disclosure (TCFD) guidelines. The company discussed ongoing education of the board on climate issues that includes outside experts and its thoughts on scope 3 emissions targets. Investors asked how climate change risk is factored into the company's acquisition decisions (such as the decision to

acquire Anadarko). It does look at potential impact on emissions, but also at ability to meet goals over time. The company reported on its decision to begin reporting support for trade associations over \$50,000 annually and agreed to consider an investor meeting with an independent director. In December 2019, a resolution was filed by ICCR partners requesting that Chevron issue a report describing if, and how, it plans to reduce its total contribution to climate change and align its operations and investments with the Paris Agreement's goal of maintaining global temperature rise well below 2 degrees Celsius. December, 2019, call with the company indicated that in addition to methane targets and flaring reduction goals the company set an oil intensity target and net intensity target for gas, both targets were on an equity basis (not just for operated assets). New carbon report planned for 2020. No action request filed by Chevron, which the SEC upheld, so the proposal did not appear on the proxy. CCSR is taking the lead on Chevron's expansion into the eastern Mediterranean with its purchase of Noble energy. Chevron remains in the DFMS investment portfolio despite the Church's fossil fuel divestment policy as part of a phased divestment initiative.

Marathon Petroleum

In July 2018, investors discussed concerns with how the company was relating to the community around its Detroit refinery, which is near several residential neighborhoods. The company had four air monitors in communities near the refinery and held monthly meetings of its community advisory panel (CAP). The company noted that some of its neighbors did not like the CAP as a forum to air concerns, so they checked in with them in other ways—individual meetings, etc. The company reduced emissions from the refinery by reducing flaring and other measures, now only 2% of area's overall air quality issues; EPA completed a study with the state environmental quality agency and found air quality near the refinery improved. The company noted that it bought out some homes in one neighborhood that borders the facility, but that was mainly because of expansion plans in that part of its campus (note that some of the neighbors were asking for a buyout in another area). Investors asked if the company has internal standards to evaluate need for buyouts, and it noted that it needs to avoid appearance of liability to purchase all interested parties, but will do so if a project warrants it.

In November 2019, DFMS submitted a resolution requesting that the Marathon board of directors develop a strategy to increase the scale and pace of the company's efforts to reduce its contribution to climate change, including establishing any medium- and long-term goals deemed appropriate by board and management that demonstrate this increased pace, with an eye toward the global commitments of the Paris Agreement. A call with the company discussed the proposal and the company said it has a new board committee that regularly discussed climate and other sustainability issues. A follow-up call a month later with corporate staff talked about the company plans to announce greenhouse gas intensity targets for scope 1 and 2 emissions of 30% reduction in intensity by 2030 (baseline year of 2014) in its proxy statement and annual report. The company planned to look at progress each year to set employee performance goals and have a sustainability metric that includes progress goals in executive compensation and employee bonuses. The company was also looking at ways to address scope 3 (product) emissions by investing in renewable fuels production

and research. Target also included methane emissions in the company's midstream business, which were already down about 20%. Capital budget items have greenhouse gas impacts incorporated into their total and contribute to budget decisions. More detail was to be included in its annual TCFD report, due out in the fall 2020. Resolution withdrawn after company announced that it was setting greenhouse gas intensity targets and agreed to further dialogue on strengthening its efforts to reduce emissions and improve its reporting, including consideration of reporting scope 3 emissions for its products.

Phillips 66

The Climate Action 100 engagement began with the company in proxy year 2019. The company noted that the majority of its emissions are scope 3, which were challenging. It was working with automakers on fuel efficiency, also investing in renewable diesel as well as ethanol. Its main focus was on reducing its own emissions through energy efficiency and reduced flaring. Its midstream operation does not move natural gas, so methane was not a big issue for the company. Company issued a climate risk report compliant with TCFD in mid-November 2018. A meeting held October 2019 focused on Climate Action 100 goals for the company including setting emissions targets. It was improving efficiency of its operations, and it had three renewable fuel projects including two sites in Nevada, joint ventures to produce renewable diesel with new equipment, and a redeployment of assets at refineries in California, which would reduce scope 3 emissions. However, company was in nascent stages of considering emissions targets.

Delta Airlines

An August 2019 call with company discussed goals of the Climate Action 100 initiative. Company was looking at ways to reduce domestic as well as international emissions, although its only goals were those in the international Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) agreement (which do not align with goals of the Paris Agreement). The company offsets its domestic emissions and was looking at how to ensure high-quality offsets once the CORSIA agreement takes effect in 2020 and other airlines begin purchasing offsets. Its main focus has been operational efficiency, with a fuel council that meets monthly to carry out implementation of targets for annual fuel reduction. It was working with Airbus to take delivery of 20 "carbon neutral" aircraft that would meet goals with a combination of biofuels and offsets. The company was partnering to develop a biofuels facility in the Pacific Northwest that will use forestry byproducts as feedstock with the hope it will be online by 2023. It was also looking at setting goals for biofuel use under CORSIA. Its sustainability work is reported directly to the board, which was increasingly discussing these issues. Company announced that it plans to become carbon neutral and will spend \$1 billion over the next 10 years on its journey to mitigate all emissions from its global business beginning on March 1, 2020.

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Devon Energy

An August 2019 call with VP for Governance and Corporate Secretary and company sustainability team focused on the company's climate risk report and methane targets. Investors encouraged the company to look more at its physical risks, particularly around water, and to consider looking at a 1.5-degree scenario as it updates its report. Investors also encouraged the company to look at scope 3 targets and to incorporate targets into its executive compensation considerations, something it was already planning to do with its methane targets. Other topics included efforts to reduce emissions through technology and leak detection practices and the company's spending on lobbying through trade associations and how those expenditures align with the goals of the Paris Agreement.

NextEra

An introductory letter was sent to the company in November 2018 regarding climate change issues and the company's plans to manage climate risk using the TCFD reporting guidelines. A call, also in November, discussed investor's request for additional disclosure on the company's efforts to manage climate risk and reduce greenhouse gas emissions. It had been hearing a lot from investors about disclosure and had increased what it reports publicly. The company had a midterm (2021) emissions reduction goal of 65% from a 2001 baseline; the company was at 50% reduction at that point and was on track to meet its goals through adoption of renewables, switch from coal to natural gas, and ongoing nuclear generation. It had adopted the Edison Electric Institute reporting framework for climate risk and sustainability, but had no plans to report to CDP or to adopt the TCFD guidelines. The company noted that it continued to get requests from investors to do so and would look at those guidelines.

Investor call in October 2019 discussed how the company was transitioning to meet its medium-term emissions reduction goal. Acquisition of Gulf Power entailed closing coal plants and transitioning others to natural gas. It viewed natural gas as a bridge fuel but did not have a timeframe for phasing out use. Although it sees "net-zero" pledges that many of its peers have made as good goals, it didn't believe that it was technologically possible yet; it won't make the pledge until it sees a way to achieve it. Also, it saw its investments in grid modernization as key to wider adoption of renewables. The company was looking at physical climate risks to assets and working to build resilience, close, or relocate vulnerable infrastructure. It had not thought about more sustainable gas supply; with limited pipeline infrastructure in Florida, it means it was limited in sourcing partners. It was also looking at ways to tie greenhouse gas goals and sustainability to executive compensation more robustly.

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Corporate Governance and Accountability

<i>Objective – Diversity on Corporate Boards of Directors</i>	<i>TEC Policy</i>
Engage companies to address board diversity to include women and people of color.	General Convention: <ul style="list-style-type: none"> oÁ 2009-D042 Renew Support for Passage of the Equal Rights Amendment oÁ 2018-B026 Embracing the United Nations Sustainable Development Goals – see goals 5 and 10

FirstCash Inc. and World Fuel Services (Resolutions)

DFMS was lead filer in proxy year 2020 on a resolution submitted to each company requesting the board of directors prepare a report on steps the company is taking to enhance board diversity beyond current levels. Call held with FirstCash to discuss the proposal. Company noted it had previously had a female and Hispanic director on its board, but for various reasons had been unable to get new directors with gender, racial or ethnic diversity. Company was committed to having a woman on its board by 2021, agreed to update its corporate governance guidelines to strengthen the language around diversity, and include language in its 2020 proxy about these commitments. Resolution withdrawn based on these commitments and agreement to a follow-up conversation with shareholders about the implementation of these practices. At World Fuel Services, the resolution was also withdrawn based on positive conversations with management and the company's commitment to add language to its corporate governance documents regarding diversity, as well as to continue engagement with investors. Mercy staff attended the company's virtual AGM where the company elected a woman to its board of directors. Additionally, the company also created a sustainability and corporate responsibility committee that will oversee initiatives on sustainability, social responsibility issues, and diversity, among other topics.

REVIEW OF NO BUY LISTS

CCSR reviewed the 5 areas that have been identified by General Convention or Executive Council for non-investment (or divestment in the case where the Church is already invested):

Tobacco

Fossil Fuels

Military Contracting

Private Prisons

Human Rights Screening

In the area of military contracting, a review is underway to see whether the present policy is adequate to fulfill the Church's ethical concern over the appropriateness of investing in companies that produce weaponry for the US military and for arms exports, an increasing concern as arms sales mushroom globally.

In the area of fossil fuels, it is noted that a number of fossil fuel companies remain in the equity portfolio of the Church while also being on the No Buy List. This is part of a transition of divestment called for by the 2015 General Convention. Chevron, now the largest oil company in the U.S., is one of those companies. ARAMCO, a government owned Saudi Arabia company, was added to the list when it became publicly traded.

IMPLEMENTATION OF THE 2018 B016 GENERAL CONVENTION RESOLUTION

2018- B016 directed CCSR to develop a human rights investment screen to deal with the Church's ethical concerns regarding corporate practices in the Occupied Palestinian Territories (OPT). The policy, adopted by Council on CCSR's recommendation, made following considerable work with members of Council, calls for non-investment or divestment in companies that support or benefit from human rights violations anywhere in the world. Accordingly, the policy is being applied globally. As a result of the policy, the Church has divested from Motorola, Caterpillar and the Israel Discount Bank for their operations in the OPT. In October 2020, DXC and Leumi Bank were added to the list for their actions in the OPT. ARAMCO, the Saudi Arabia owned oil giant, was also added to the list for Saudi Arabia's abysmal human rights record. A full copy of CCSR's report to Council on B016 is available on the CCSR documents website.

IMPLEMENTATION OF THE 2018-B007 GENERAL CONVENTION RESOLUTION

The resolution directed CCSR to develop a plan for DFMS to invest in gun manufacturers and retailers aimed at convincing the companies that gun safety measures would improve the company's reputation and financial profitability by contributing to a safer society while protecting gun owners' rights. A full copy of CCSR's report to Council on B007 is available on the CCSR documents website. As a result of its work, the Church purchased stock in Wesson and Smith and Strum Ruger. A third gun manufacturer, Olin, had been purchased earlier by the Church's money managers. B007 was the first time the Church, due to ethical concerns, has directed DFMS to invest in a company to try to improve the company's performance. The general unwritten practice for many years has been that money managers under the direction of the Investment Committee make all investment decisions except as guided by the Church's 5 No Buy Lists. Here General Convention exercised its undoubted authority to direct investments.

IMPLEMENTATION OF THE 2018 C021 GENERAL CONVENTION RESOLUTION

The 79th General Convention of The Episcopal Church called upon the Executive Council Committee on Corporate Social Responsibility (CCSR), in conjunction with The Church Pension Fund (CPF), to identify 10 companies within the two portfolios that significantly impact the environment, and initiate shareholder engagement to advocate for the inclusion of an expert in sustainability on their boards.

CCSR and CPF have worked together on a range of shareholder engagement initiatives including those supporting this resolution. Over the triennium, more than 10 companies have been engaged

on sustainability expertise and good governance. The engagements have focused both on board expertise, but also expertise and support of sustainability initiatives within executive management. The shareholder engagement efforts for both CCSR and CPF are supported by Mercy Investment Services. Mercy provides strategic guidance and staffing support for shareholder engagements, working closely with CCSR members and CPF employees. Some of the engagements have been coordinated as part of Climate Action 100, an investor initiative to ensure the world's largest corporate greenhouse gas emitters take necessary action on climate change.

Companies engaged included: American Airlines, Chevron, Corteva, Delta, EOG, Flir, Marathon Petroleum, Pepsi, Phillips 66, Southwest, United Continental.

Companies were responsive to varying degrees. Some have board level committees that are responsible for driving sustainability considerations through the company. Others have executive working groups that perform this work and inform the board. There are companies with individuals leading corporate sustainability and environmental, social, and governance issues. Companies have also taken advantage of external sustainability experts, using them to inform the company of material issues to address. As it relates to expertise, individuals involved in corporate management of sustainability may have different backgrounds ranging from direct sustainability and scientific education and experience, to business experience with a sustainability focus. For those companies on the Climate Action 100 focus list, the results of investor engagements will be benchmarked in early 2021. The "Climate Action 100 Net-Zero Company Benchmark" will provide comprehensive analysis on which companies are leading the transition to net-zero emissions, alongside a range of other indicators on climate governance and performance.

In conversations with these companies, CCSR and CPF were able to reinforce the importance of sustainability as a strategic lens through which to drive long-term shareholder returns, requiring the needed expertise. Both CCSR and CPF also emphasized that while we believed sustainability to be an investment issue, as a faith based community these issues matter given our responsibility to care for creation.

NEW INITIATIVES FOR 2020-2021 SHAREHOLDER SEASON

As this report is written, CCSR is engaged with companies for the 2020-21 shareholder season. New work includes engagement with pharmaceutical companies over their opioid drug policies in light of the 2018 General Convention resolution on this subject. New companies added to work for the current season are: Walgreens and Johnson and Johnson (opioid crisis), Valero (methane emissions), FLIR, Chewy and General dynamics (adding a sustainability expert to its board of directors) and Skechers (adding diversity on its board of directors). The work was approved by Executive Council as follows:

- Request United Airlines to report on their efforts to curtail labor trafficking in its supply chain and sex trafficking;
- File shareholder resolutions with one or both Trip Advisor and Chevron, requesting a report on the company's impact in areas of conflict where violations of international law and human

rights have been identified, with attention to Chevron on its oil exploration in the Eastern Mediterranean off the coast of Israel and the Gaza Strip and elsewhere;

- Á File resolutions with Walgreens and Johnson and Johnson (requesting information on opioid drugs that can lead to addiction[PZ2]);
- Á File a shareholder resolution with Sturm Ruger requesting adoption or compliance with human rights principles in their business planning and operations and report on their efforts to minimize criminal uses of their products;
- Á File shareholder resolutions with one or both of Phillips 66 and Valero asking the companies to adopt science-based targets for reducing methane emissions;
- Á File shareholder resolutions with one or more of the following companies: FLIR, Chewy and General Dynamics, asking the companies to appoint a sustainability expert to their boards of directors;
- Á File a shareholder resolution with Skechers asking the company to add a person of color and/or a woman to its board of directors.

A new likely target for 2020-21 and beyond is Cisco, which operates in many conflict areas, including occupied territories, where human rights are violated, particularly in Myanmar, China (Uighur suppression) and the Occupied Palestinian Territories.

CCSR, aware of the Presiding Bishop's emphasis on racial injustice in America, joined other ethical investors in asking for an end to sponsorship of the Washington football team by Pepsico, part of a movement that ended the racist name of the team. And CCSR continued its decades long advocacy for corporate America to include people of color and women on its board of directors. Finally, CCSR noted General Convention's concern for immigration reform and is reviewing advocacy options, through ICCR, such as asking hotels not to house undocumented minors who are secretly held until they can be returned to their country of origin, without due process for asylum. These minors face death threats in their home countries from gangs. ICCR sent a letter to Marriott in June 2019 seeking a commitment to not house ICE detainees. As noted on page 2, at the urging of shareholders, Marriott publicly stated it would refrain from using its hotels for hosting families taken by ICE officials in immigration raids.

CCSR has had a long time goal of assisting dioceses and endowed congregations to become informed and involved in the work of corporate responsibility and hopes to have the resources to further that goal in the future. CCSR's vigorous engagement with corporations 50 years after its founding while monitoring No Buy lists on issues of concern to the Episcopal Church will remain an important part of TEC's overall advocacy to build a more just world as envisioned in the heart of the Gospel of Jesus Christ.

Continuance recommendation

The Committee recommends continuance. 2021 marked the committee's 50th anniversary. In 1971, Presiding Bishop John Hines defended the first ever shareholder resolution filed by a faith based organization at General Motors annual meeting calling on the company to leave South Africa until the racist system of apartheid was ended. The work of CCSR was begun. As long as the Church

continues to invest in securities the work of CCSR will be needed to assure the Church's values are not undermined through hypocrisy arising from a financial return in investments in companies that violate the Church's commitment to justice and the care of creation. A recent rise in global arms sales is a good example of why a committee for corporate responsibility is needed. Corporations make these armaments. The continuing problem of climate change is another. Corporations are a primary cause of this crisis that looms larger with each passing day, with each new record hurricane, with each new record fire season, with each new season of flooding. The work of CCSR is exponentially important.

From that early beginning in 1971, CCSR's work, and that of its ecumenical partner which CCSR helped found, the Interfaith Center on Corporate Responsibility (ICCR), has engaged in shareholder advocacy aimed at environmental, social (justice) and governance (ESG) accountability by corporations. The focus on these three areas of ESG has increasingly proven to affect not only the ethical concerns of faith based investors, but also has impacted a positive financial return. Good ethical corporate policy is good for a business's bottom line.

Over the 50 years of its work, CCSR, which began under the name the Social Responsibility in Investments Committee until a name change in 2008, has gradually widened its corporate advocacy in keeping with the Church's widening justice oriented policies developed by General Convention and Executive Council. The areas of focus include human rights, sex and labor trafficking, health concerns (including gun safety), diversity in corporate America and care of creation. Over the years, corporate engagement by the Church has been expanded to include corporate divestment on selected issues such as private prisons and fossil fuels. And, in one selected instance, the Church has invested in certain gun manufacturers to promote gun safety, which have both ethical and financial considerations.

CCSR works closely with the Office of Government Relations. There is a deepening understanding that advocacy with both government and corporations complement each other. For example, CCSR and OGR both work for gun safety in the United States. Change is sought both through Congress and among the major gun manufacturers and retailers. Good corporate citizenship might sometimes be more attainable than a Congress prone to inertia. And conversely, Congress (and the White House) might better affect more just outcomes than recalcitrant corporations. There are examples of both. Working in tandem, CCSR and OGR play significant roles in implementing Church social justice and environmental policies. Results are tangible and measurable.

CCSR Support

CCSR primarily implements Church policy rather than recommending new policy. Committees charged with implementation rely on staff or consulting support to accomplish the work. In-face committee meetings, whenever they resume post pandemic, are covered by a block grant used by all interim bodies. However, staff and consulting costs for research and preparing recommendations require other sources of money. CCSR has some members and volunteer consultants who donate significant time and labor on behalf of the committee, but there is need for further expertise and staff/consultant support. CCSR notes a cautionary tale which is sadly a part of its 50 year history. It is

noted here in order that it be in the historical record, and, hopefully to avoid similar events in the future. In 2009, the General Convention committee on Program, Budget and Finance defunded entirely the committee's budget. From that time until 2016, the work of the committee was severely crippled, receiving minimal but appreciated assistance from the Finance office.

In 2016, the President of the House of Deputies noted the decline in CCSR's work and appointed seasoned members to help resuscitate it. The Presiding Bishop also responded to the concern about a lack of adequate monetary support for the work of the committee and with the assistance of the Treasurer, consulting help from Mercy Investments Services, Inc., a ministry of the Sisters of Mercy of the Americas, a Roman Catholic congregation of women, was engaged. The 2018 General Convention legislative committee 18 (Stewardship and Socially Responsible Investing) noting the importance of CCSR's work, proposed resolution A296, which was adopted. A296 directed "the Executive Council to maintain an independent membership in the Interfaith Center on Corporate Responsibility;" which had lapsed after 2009, and directed "the Executive Council to treat expenses associated with this membership, as well as on-going socially responsible investment consulting fees, as investment management expenses, rather than program expenses." ICCR, where the work of corporate engagement is coordinated among all our ecumenical partners, celebrated the return of TEC's membership.

Having Mercy Investments has been a tremendous boon to the work of the committee. Because Mercy is itself active in shareholder work, it is able to represent not only itself but CCSR in its many corporate engagements. Members of CCSR participate in some of these engagements but not all. Thus, Mercy's involvement is an essential component of CCSR's work and provides regular reporting and offers opportunities for CCSR's engagements on a number of fronts. Mercy's contract for 2022-24 is estimated at \$130,000.

In the 2019-21 triennium, CCSR was given an additional \$10,000 by the Executive Council to provide expertise on its human rights work in the wake of General Convention's call for a human rights investment screen. This provided expertise beyond what Mercy is able to offer since Mercy cannot provide investment advice. Such expertise for the next triennium in the areas of human rights and climate change would be enormously significant in enabling CCSR to address these two global issues. An amount of \$40,000 per annum beyond Mercy's work would allow for a robust body of work on behalf of the whole Church. A further modest amount of \$5,000 per annum would allow for some educational efforts with dioceses and endowed congregations and institutions. As Executive Council and Program, Budget and Finance work towards the 2022-24 triennial budget, CCSR hopes that ways can be found to strengthen the impact of CCSR's leadership in the field of corporate responsibility by strengthening staff and consulting support, utilizing A296 from the 2018 General Convention.

CCSR Mandate:

CCSR proposes changes to its mandate for 2022-24 in order to more accurately reflect its scope and work:

Resolved, That the Executive Council, meeting in XXX, on XXX, 2021, continue the Executive Council Committee on Corporate Social Responsibility to be responsible for monitoring the DFMS investment portfolio and advocating for the Episcopal Church's values as expressed in policies of the General Convention and Executive Council on environmental, social and governance issues. Areas of special concern are as follows, but not limited to: Human Rights (including sex and labor trafficking), Health and Safety (including gun safety), Care of Creation (including Climate Change), and Governance and Corporate Accountability, (including corporate Board Diversity). The committee shall recommend appropriate courses of action to the Council for corporate engagement including shareholder resolutions (to be submitted by the Treasurer or another corporate officer of the DFMS), dialogues, letter writing and participation in sign on letters. Sign on letters are vetted by the Office of Government Relations for adherence to Church policy and can be signed by the Presiding Bishop, the President of the House of Deputies, the Treasurer, the Director of Government Relations, a designated CCSR member or consultant, as may be most appropriate. The committee shall also oversee the DFMS No Buy lists and recommend divestment as guided by No Buy policies, and may recommend revisions to such policies to comply with Church ethical policy. CCSR will also regularly review the DFMS proxy voting guidelines to apply to other shareholder resolutions being offered by faith based partners or advocacy groups and recommend whether the Episcopal Church should support them. The committee shall maintain an Advocacy Account (stock holdings) of companies with which it is engaging in a separate investment portfolio in furtherance of its work, maintaining roughly the minimum shares and dollar value required by the Securities and Exchange Commission regulations. This prevents the stock being sold in the midst of shareholder engagement. Committee reports and recommendations will be forwarded to the Executive Council through the Council's Finance Committee and appropriate standing committee(s) on program (domestic and international). Finance will process CCSR resolutions in consultation with program committees. As new issues come up during the triennium, CCSR will forward its recommendations to the next meeting of Executive Council. Once Council approves of an issue and company in which dialogue, letter writing or filing a shareholder resolution is taken, CCSR may pursue that issue and company for the duration of the triennium without further Council action. Minutes and other pertinent documents shall be posted to the CCSR public website of the General Convention.

The committee shall monitor and advise Council on regulatory changes at the SEC. And, as resources are available, CCSR will advise the wider Church on ways and means to be involved in socially and environmentally responsible investing for dioceses, congregations and institutions that have financial investments. CCSR may engage volunteer consultants with expertise in corporate responsibility work. And paid consultants may be used through management expenses or budgeted allocations.

Membership will consist of nine members, including at least one bishop, one priest or deacon and one lay person. At least one shall be a member of the Council's Finance committee, and at least one member of its social/environmental concerns committee(s), one of whom shall serve as liaison between CCSR and the Council. CCSR will help facilitate a report by the Council's Economic Justice Loan Committee at least once in the triennium. Liaisons between CCSR and the Investment

Committee may also be appointed with or without voting privileges. Staff in the Finance Department will assist the committee at the direction of the Treasurer, and the Office of Government Relations will assist the committee at the direction of the Director of Government Relations. CCSR shall report to General Convention through the Blue Book fulfilling its canonical duties. Members will be nominated by the Presiding Officers of the Executive Council jointly and elected by Executive Council.

EXECUTIVE COUNCIL CONANT FUND GRANT REVIEW COMMITTEE

Membership

The Rt. Rev. Brian Thom, <i>Chair</i>	Idaho, VIII	2021
The Rev. Anne E. Kitch	Newark, II	2021
Canon Dr. Steven Nishibayashi	Los Angeles, VIII	2021
The Rt. Rev. Dabney Smith	Southwest Florida, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

The Committee received extraordinary assistance from Ms. Ann Hercules, Associate for Ministry Beyond The Episcopal Church and Grants.

Summary of Work

The Executive Council Conant Fund Grant Review Committee is charged with receiving, reviewing and making recommendations for awards funded by Trust Fund 649, the William Schubael Conant Fund. Conant Grant funds are provided for the improvement of seminary-based theological education. Specifically, the grants are directed for the support of theologically academic research, textbook preparation, and course development undertaken by faculty members, normally during a sabbatical break, at the recognized Episcopal seminaries in the United States.

Grants totaling \$128,515.00 were awarded to 19 recipients for the academic year 2019-2020; and \$125,450.00 to 13 recipients for the academic year 2020-2021. Recipients are notified that implementation of their grants must conform to any and all regulations related to COVID-19 that may exist at the time of implementation.

EXECUTIVE COUNCIL CONSTABLE GRANT REVIEW COMMITTEE

Membership

Mr. George Wing, <i>Chair</i>	Colorado, VI	2021
The Rev. Canon James Callaway, D.D.	New York, II	2021
Canon Noreen Duncan	New Jersey, II	2021
The Hon. Rose H. Sconiers	Western New York, II	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

The Committee gratefully acknowledges the staff assistance of The Rev. Tom Brackett, Ms. Ann Hercules, Ms. Margareth Crosnier de Ballaistre, The Rev. Dr. Molly James, and The Rev. Melanie Mullen.

Mandate

GAM 013 (2011) To broaden participation from the wider church in the application review process and get the Executive Council involved earlier in the process. Membership includes three members of the Executive Council Standing Committee on Local Ministry and Mission, a person from the General Convention Office, a person with broad grant experience, a person from the Finance Office and a staff person with program responsibility from the Mission Department at the Church Center. Chair and Vice Chair appoint.

Summary of Work

History and Purposes

The Constable Fund Grants are named for Marie Louise Constable, who was a visionary and philanthropist. In 1935, during the Great Depression, Constable made a monetary gift to The Episcopal Church to establish the Constable Fund. Her desire and intent to add periodically to the fund during her lifetime was realized and culminated with a very generous final gift at the time of her death in 1951. The language of Constable's will provides that the fund exists "in perpetuity ... to apply the net income for the purposes of the [Domestic and Foreign Missionary] Society, preferably for the work in religious education not provided for within the Society's budget." Grants are primarily made for religious education in compliance with Ms. Constable's wishes and the resolutions of the Executive Council regarding the Constable Fund.

For the purposes of the Constable Fund, religious education is defined as follows: Religious education forms Christians for active service through a process of critical reflection on the events of daily life in light of the Gospel. It is also a procedure by which we examine and reflect on how faithfully we engage in that service and in formation. By learning to see more clearly God's living presence in the world—Father, Son, and Holy Spirit—a Christian is prepared for Christ-like, loving service to God, neighbor, and all creation. (Adapted from "Called to Teach and Learn, a catechetical guide for The Episcopal Church".)

Meetings:

The Constable Fund Grant Review Committee has met on the following dates: May 10, 2019, September 17, 2019, October 11, 2019, December 4, 2019, May 1, 2020, June 1, 2020, and November 18, 2020. A meeting is scheduled on February 4, 2021. The Committee expects to meet two or more additional times in 2021. All meetings are by Zoom teleconferencing and telephone conferencing.

Applications:

Each of the nine provinces of the Episcopal Church may submit one application. Individuals, congregations, and dioceses must submit their grant proposals to their provinces for consideration as the province's official grant application. Interim bodies, such as Standing Commissions, Task Forces, Boards, and other committees may submit one application each. Program Offices and Staff Departments of the Episcopal Church may also submit one grant application each. Grant applications are not accepted when funding is available through the Church budget.

The Work of the Constable Fund Grant Review Committee:

In 2019 and 2020 the Committee engaged in an ongoing review of the grant application and review process. The application notices and forms are available online on the Church website, www.episcopalchurch.org. Grant applications are filed online on Formstack. The Committee has developed an online evaluation form for its internal use to assist it in considering and making recommendations on grant applications. The Committee consults with the Finance Office to determine whether a proposed grant is eligible for funding through the Church budget and is therefore ineligible for a Constable Fund grant. In 2020 the Committee took the effect of the COVID-19 pandemic into consideration as part of its grant review process. The Committee's grant recommendations are submitted for review and approval to the Executive Council's Joint Standing Committee on Mission Within the Church prior to their consideration by the Executive Council. The Committee recommended grants in 2019 and 2020. The 2021 grant cycle is currently in process.

2019 Grants:

In 2019, the Constable Fund Grant Review Committee recommended a total of \$209,000.00 in grants to the following:

1. Department of Faith Formation(Staff) – Support for Episcopal Service Corps, \$35,000.00
2. Standing Commission on World Mission – Holy Land Study Program, \$60,000.00
3. Task Force on Dialogue with South Sudanese Anglican Diaspora (Do88) – Pilgrims on the Road to Emmaus (a conference), \$58,000.00
4. Jerusalem Peacebuilders (Province I) - Blessed are the Peacemakers: Empowering youth for interfaith peace and justice ministries, \$20,000.00
5. Office of Ecumenical and Interreligious Relations (Staff) - “Abraham: Out of One, Many,” \$36,000

2020 Grants:

In 2020 the Constable Fund Grant Review Committee recommended a total of \$209,500.00 in grants to the following:

1. Office of Indigenous Ministry - Doctrine of Discovery Training, \$34,000.00
2. Office of Global Partnerships – Global Mission Toolkit, \$50,000.00
3. Standing Commission on Liturgy and Music - Liturgical Gathering, \$2,500.00

4. Standing Commission on World Mission – Military Chaplains Just War Education Project, \$43,000.00
5. Province I-Preparing Lay Leaders, \$19,000.00
6. Province III – Understanding Substance Abuse, \$7,500.00
7. Province IV – Pilgrimage to the Fields (Outreach to Migrant Farmworkers), \$15,000.00
8. Province VII – Rural & Small Church Summit, \$4,500.00
9. Province VIII – Play, Pray & Sparkle (St. John’s Episcopal Church, Indio, CA), \$34,000.00

2021 Grants:

The 2021 grant cycle is in process. The 2021 application closing date is February 15, 2021. When it completes the process of receiving and considering the 2021 grant applications, the Committee will forward its recommendations to the Executive Council’s Joint Standing Committee for Mission Within the Church for review and approval prior to their consideration by the Executive Council.

EXECUTIVE COUNCIL ROANRIDGE TRUST GRANT REVIEW COMMITTEE

Membership

Mr. George Wing, <i>Chair</i>	Colorado, VI	2021
The Rev. Canon James Callaway, D.D.	New York, II	2021
Canon Noreen Duncan	New Jersey, II	2021
The Rev. Evan Fischer	Ohio, V	2021
The Rev. Canon Katherine Harrigan	Central Pennsylvania, III	2021
The Hon. Rose H. Sconiers	Western New York, II	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

The Committee gratefully acknowledges the staff assistance of: Ms. Ann Hercules, The Rev. Dr. Molly James, Ms. Cecilia Malm, and The Rev. Melanie Mullen.

Mandate

HISTORY: The Cochel family originally gave a working farm in Missouri called Roanridge to the Episcopal Church to provide a unique setting in which Episcopal clergy, seminarians, and lay people could develop an understanding of farming operations and rural community structure. Through educational programs such as conferences, seminars, and institutes, the non-profit corporation that managed Roanridge sought to help Episcopal clergy and laity better serve communities in rural and small-town America. The farm was eventually sold and the Roanridge Trust was established.

PURPOSE OF THE TRUST: The interest generated from the Roanridge Trust is specifically to be used for the training of town and country clergy and rural Christian workers of the Episcopal Church.

WHAT IS AVAILABLE: The Roanridge Trust generates approximately \$160,000 in funds to be distributed each year.

WHO ADMINISTERS THE TRUST: The Roanridge Trust is administered by the Mission Department of the Domestic and Foreign Missionary Society (DFMS).

Summary of Work

History and Purposes of the Roanridge Trust:

The Roanridge Trust was established to honor the gift by the Cochel Family of a working farm in Missouri, called Roanridge, to The Episcopal Church. In 1976, upon the sale of the Roanridge Farm, the Executive Council created the William A., Caroline F. Cochel and Roanridge Trust, now known as the Roanridge Trust, out of the proceeds of the sale. The Executive Council directed that the Roanridge Trust grants were to be used for the "training of town and country ministry and rural Christian workers" of The Episcopal Church. Income from the Roanridge Trust generates the grant funds.

The Roanridge Trust grants support creative models of leadership development and training for laity and clergy in small towns and rural communities across The Episcopal Church. These grant awards affirm the rich gifts and unique witness at work in rural communities. They are a key piece of the "Jesus Movement" in building leaders who sustain hope, health and creativity in often overlooked or under resourced localities. Roanridge Trust Grant recipients annually represent the great potential, diversity, and Jesus-rooted resilience in rural communities and small towns.

Meetings:

The Roanridge Trust Grant Review Committee has met by Zoom teleconferencing and telephone conference calls on the following dates: May 10, 2019, May 29, 2019, January 13, 2020, January 29, 2020, and September 23, 2020. The Committee expects to meet three or more times in 2021.

The Work of the Roanridge Trust Grant Review Committee:

In 2019 and 2020 the Committee engaged in an ongoing review of the grant application and review process. The application notices and forms are available online on the Church website, www.episcopalchurch.org. Grant applications are filed online on Formstack. The Committee has developed an online evaluation form for its internal use to assist it in considering and making recommendations on grant applications. The Committee's grant recommendations are submitted for review and approval to the Executive Council's Joint Standing Committee on Mission Within the Church prior to their consideration by the Executive Council. The Committee recommended grants in 2019 and 2020. The 2021 grant cycle is currently in process.

2019 Grants:

13 grants were recommended in 2019 for the total amount of \$208,843.00.

1. Á Embracing Abundance: Cultivating Vocational Resources in Community, Diocese of California: \$20,000.00
2. Á Wild Church: Training for Church Outside the Walls in Upper Peninsula, Diocese of Northern Michigan: \$20,000

3. Saint Marks Garden of Hope Caring and Sharing Training Program, Diocese of Georgia: \$9,770.00
4. Grace Leadership Project, Diocese of New York: \$20,000.00
5. Harbor Roots Farm: Chaplains on the Harbor Olympia: \$20,000.00
6. SSFM Collaborative Entrepreneurial Mission Center, Diocese of Central Pennsylvania: \$15,000.00
7. CPE for Lay Pastoral Caregivers, Diocese of Los Angeles: \$10,000.00
8. Leadership Bootcamp, Diocese of Missouri: \$15,000.00
9. Forming Leaders in Largely Rural and Culturally Diverse Dioceses, Diocese of Olympia (for Dioceses of Olympia and Rio Grande): \$10,098.00
10. Rural & Migrant Ministry, Rural University of the People, Diocese of Rochester \$20,000.00
11. Church Lands, Diocese of Western Michigan: \$18,975.00
12. Waycross Camp and Conference Center, Diocese of Indianapolis: \$15,000.00
13. Co-creating Beloved Community, Diocese of Southern Ohio: \$15,000.00

2020 Grants:

16 grants were recommended in 2020 for the total amount of \$209,110.00.

1. Creating Sa' a naghái bik'e hózhó, Diocese of Navajoland, \$19,540.00
2. Theological Education in Honduras, Diocese of Honduras, \$20,000.00
3. Formados para Transformar, Diocese of Cuba, \$5,940.00
4. Training of Karein Catechists and Deacons, Staff/Diocese of Tennessee, \$20,000.00
5. Leadership Coaching, Diocese of Fond du Lac, \$19,000.00
6. Rural Church Summit and Learning Communities, Diocese of Iowa, \$15,750.00
7. Broad-Spectrum Bi-Vocational Ministry, Diocese of New Hampshire, \$16,000.00
8. Free Range Priest, Diocese of North Carolina, \$7,000.00
9. Transformational Opportunities, Episcopal Church Foundation/Diocese of Minnesota, \$10,000.00
10. Backstory Preaching Mentorship, Diocese of Western Kansas, \$10,000.00
11. Special Needs of Underserved Children, Diocese of Missouri, \$8,000.00
12. ROCSTARS, Diocese of Oregon, \$10,000.00
13. A.C. Marble School for Theological Formation, Diocese of Mississippi, \$10,000.00
14. Healing Trauma through Healing of Memories, Diocese of Kansas, \$10,000.00
15. Keystone-Northfork Kinship Care, Diocese of West Virginia, \$10,000.00
16. Workshop in Congregational Singing, Diocese of Maryland, \$2,880.00

2021 Grants:

The Committee has received 16 applications for 2021 grants. When it completes the process of considering the 2021 grant applications, it will forward its recommendations to the Executive Council's Joint Standing Committee for Mission Within the Church for review and approval prior to their consideration by the Executive Council.

SCHOLARSHIP GRANT COMMITTEE

Membership

The Rev. Canon E. Mark Stevenson, <i>Chair</i>	Louisiana, IV	2021
Mr. N. Kurt Barnes	New York, II	2021
The Rev. Theodora Brooks	New York, II	2021
Ms. Margareth Crosnier de Bellaistre	New York, II	2021
The Rev. Angela Goodhouse-Mauai	North Dakota, VI	2021
Mrs. Andrea McKellar	South Carolina, IV	2021
Ms. Raphaelle Sondak		2021

Acknowledgements

The Committee receives exceptional assistance from Ms. Ann Hercules, Associate for Ministry Beyond The Episcopal Church and Grants.

Mandate

Scholarship Program

As a result of bequests, The Domestic and Foreign Missionary Society of the Protestant Episcopal Church (DFMS) makes available a modest number of scholarships that assist students primarily enrolled in theological education and specialized training. Funding for the program is derived from annual dividends of designated trust funds established by generous donors. Several other trusts benefit children of current and former missionaries.

Currently there are forty-three trust funds available for scholarships. The oldest scholarship trust fund, The Mary E. Hinman Fund, was established in 1879.

The program is administered by a Scholarship Committee composed of a Member of Executive Council, a member of the church at large, the Canon of the Presiding Bishop staff for Ministry within The Episcopal Church; the Director of Human Resources; and representatives from various ministries at The Episcopal Church and the Treasurer's Office. The Scholarship Committee meets once a year in the spring to review applications and award scholarships.

Prior to the Scholarship Committee meeting, Sub Committees meet and make their respective selections. Sub Committees consist of the missionary and other selected people for each ministry involved (e.g., Black, Asian, Native American and other).

Summary of Work

The Episcopal Church awards scholarships of up to \$10,000 for educational purposes to a variety of constituents within the broader Episcopal community. The scholarships are derived from annual income of designated trust funds established by generous donors through bequests to The Episcopal Church.

The program is administered by a Scholarship Committee composed of a member of Executive Council, a member of the church at large, the Canon to the Presiding Bishop for Ministry within The Episcopal Church, the Director of Human Resources, and representatives from various ministries at The Episcopal Church and the Treasurer's Office. Prior to the Scholarship Committee meeting each spring, Sub-Committees meet and make their respective recommendations. The Scholarship Committee reviews applications and approves award recommendations.

Some of the scholarships support students enrolled in theological education and training. Other scholarships are available for educational training for ethnic communities, children of missionaries, bishops and clergy, and other groups, covering a wide range of eligibility. Currently there are forty-three trust funds available for scholarships. The oldest scholarship trust fund, The Mary E. Hinman Fund, was established in 1879.

During the 2019-2020 academic year, awards totaling \$366,122.16 were made to 110 students; during the 2020-2021 academic year, awards totaling \$383,810.83 were made to 128 students.

EXECUTIVE COUNCIL COMMITTEE ON ANTI-RACISM & RECONCILIATION

Membership

Mr. James McKim, <i>Chair</i>	New Hampshire, I	2021
The Rev. Yamily Bass-Choate	New York, II	2021
Dr. Frances Dannenberg	Pittsburgh, III	2021
The Rev. Canon John Kitagawa	Arizona, VIII	2021
Ms. Ayesha Mutope-Johnson	Texas, VII	2021
The Rev. Susie Shaefer	Michigan, V	2021
The Ven. Paul Sneve	South Dakota, VI	2021
The Rt. Rev. Morris K. Thompson, Jr.	Louisiana, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The current composition of the Executive Council Committee on Anti-Racism (ECCAR) was created by General Convention Resolution 2015-A023. Representatives were named from all provinces.

We would like to thank the members of the Committee who remained with us this triennium:

- Mr. James McKim representing Province I
- Ven. Paul Sneve representing Province VI
- Ms. Ayesha Moutope-Johnson representing Province VII
- Rev. Angela Shepherd representing Province IV who moved from Province III
- Rev. Emilio representing Province IX

New members for the triennium included:

- Mr. Brian Romano representing Province II
- Dr. Frances Dannenberg representing Province III
- Rev. Susie Shaefer representing Province V
- Rev. Canon John Kitagawa (Vice-Chair) representing Province VIII
- Rt. Rev. Morris Thompson representing the House of Bishops

As a result of the 2018 General Convention, the Executive Council was restructured. Thus, the first few months of the triennium were spent with no liaison to Executive Council from which to get guidance.

Mr. Brian Romano left the Committee in May 2019. Rev. Yamily Bass-Choate replaced him in May 2020.

Acknowledgements

In March 2019, Executive Council selected Canon Noreen Duncan to join the Committee as the Liaison of Executive Council through the Executive Council Joint Standing Committee on Mission Within The Episcopal Church. The Committee would like to thank her for her support.

Staff Liaison Ms. Heidi Kim left the Committee in April. Rev. Isaiah “Shaneequa” Brokenleg replaced her in June 2020.

Since the Spring of 2018, Rev. Timothy Seamans had been serving as an ad-hoc Youth Representative. In March 2019 he moved to California and left the Committee. No replacement was named.

We would like to thank Rev. Dr. Stephanie Spellers Canon for Evangelism, Reconciliation and Creation Care and House of Deputies Vice-President Byron Rushing for participating in several meetings.

Mandate

2018-A043

Resolved, That the mandate for the Executive Council Committee on Anti-Racism be amended, and hereby read as follows:

“This Committee is charged with supporting and monitoring the Church’s work in response to General Convention resolutions directed at eliminating the sin of racism from the life of the Church by:

Recognizing and developing its work of racial healing, justice, and reconciliation as a fundamental and requisite part of Christian formation; supporting the work of Becoming Beloved Community: The Episcopal Church’s Long-Term Commitment to Racial Healing, Justice, and Reconciliation; recommending best practices for dismantling racism training; collecting information from dioceses and provinces about their successes and challenges in complying with the canonical requirements and with General Convention Resolution 2000-B049 for providing anti-racism training; and sharing their findings with Executive Council on an annual basis.”

Summary of Work

In addition to the mandate above, the Committee's work is, also, directed by GC 2018-A045 which reads as follows:

“Resolved, That we acknowledge that not all dioceses have followed the spirit of the anti-racism training required in Title III or General Convention Resolution 2000-B049 regarding training of all ordained persons and lay leadership; and be it further

Resolved, That we acknowledge that the work of dismantling racism is an essential part of spiritual formation; and be it further

Resolved, That the 79th General Convention re-affirms the necessity and importance of anti-racism training for the lay and ordained leadership of The Episcopal Church, including all ordained persons, professional staff, and those elected or appointed to committees, commissions, agencies, task forces, and boards; and be it further

Resolved, That the Executive Council Committee on Anti-Racism and The Episcopal Church staff, The Absalom Jones Episcopal Center for Racial Healing and Christian Formation professionals be encouraged to work together to continue to expand the resources available for trainings that can be adapted to different contexts and that address the multiplicity and intersectionality of oppressions that exist in society, and maintain online a recommended list of curricula and programs as they are developed, that could be used for anti-racism training and for training facilitators; and be it further

Resolved, That the lay and ordained leadership of The Episcopal Church are also expected to engage in ongoing spiritual formation and education focused on racial healing, justice, and reconciliation as part of our Church's commitment to Becoming Beloved Community; and be it further

Resolved, That each committee, commission, agency, task force, and board, and each province and diocese maintain a register of those who have participated in training, and annually report to the Executive Council through the Executive Council Committee on Anti-Racism by January 1 each year, how many people have participated in training and what other Becoming Beloved Community formation opportunities have been offered and that the Council report on this information to future General Conventions until such time as the Executive Council Committee on Anti-Racism or its succeeding body determines it is no longer necessary.”

The triennium began with mandate which seemed to contradict some previously passed resolutions (namely GC 2015-A022 and GC 2018-A045). The Committee spent the first few months of the triennium working with staff and the Executive Council Joint Standing Committee on Mission Within The Episcopal Church trying to reconcile those conflicts. The conflicts still seem to exist. We are putting forth a resolution to clarify these conflicts.

The past triennium has been one of the most challenging in our history. The leadership of the United States seems to have divided the nation to an extent many feel has not been the case since the U.S. Civil War. Because of this context in which we live, the Committee understood the need for the work it was mandated to do was more important now than ever.

The good news is, the Church continues to commit itself to racial reconciliation. There seems to be a growing hunger for the work. More and more attention and resources are being applied to the work.

The Committee was very active meeting monthly on Zoom throughout the Triennium with breaks for the Summer months and December.

This section describes the work of the Committee toward fulfilling its mandate as described in both GC Resolutions 2018-A043 and 2018-A045.

GC Resolutions 2018-A043

Recognizing and Developing Its Work Of Racial Healing, Justice, And Reconciliation As A Fundamental And Requisite Part Of Christian Formation

The Committee, regularly, reflected on the importance of theology in its work and in the anti-racism and racial reconciliation work of the Church. Each of our meetings started and ended with prayer. Many of the prayers followed the sentiments of the prophet Micah, who taught that the Lord requires us to “do justice, love mercy and walk humbly with our God.”

The results of the 2016 election and the actions of many in positions of power made it clear to the Committee that contrary to popular belief, the election of an African American President did not signal the end of racism in the United States. But, instead, it caused a backlash against People of Color. This backlash has negatively impacted people around the world.

The Committee recognizes that there are some in the Church who have not met the objective of Mission Mark 4: “to seek to transform unjust structures of society, to challenge violence of every kind, and to pursue peace and reconciliation.” We continue to see evidence that there are people in U.S. and non-U.S. dioceses who do not fully appreciate the power and impact of racism on people’s lives. These are the people the Committee feels called to invite to follow the Baptismal Covenant to “respect the dignity of every human being” and to meet the objective of Mission Mark 4.

Following the words of Presiding Bishop Michael Curry on July 1, 2020, regarding the President’s use of St. John’s Episcopal Church as a platform for divisive rhetoric, “For the sake of George Floyd, for all who have wrongly suffered, and for the sake of us all, we need leaders to help us to be 'one nation, under God, with liberty and justice for all.'” We reaffirmed that the work of anti-racism, racial reconciliation, healing, and justice must be a central part of both Christian Formation and the development of Church leadership so that we can help create these leaders who will live into those words.

Supporting The Work Of Becoming Beloved Community: The Episcopal Church's Long-Term Commitment To Racial Healing, Justice, And Reconciliation

We applaud the work of staff posting guidelines, such as the Becoming Beloved Community, and their engagement across the Church, such as the work of our Staff Liaison Rev. Brokenleg, who worked with Dioceses of Oregon, Olympia, South Dakota, San Diego, Long Island, Colorado, Nebraska, MN, and Fond du Lac.

The Committee undertook several actions to support the work of Becoming Beloved Community.

- Á Rev. Kitagawa served on the Presiding Bishop's Becoming Beloved Community Committee which ran the Becoming Beloved Community Summit mandated by GC Resolution 2018-A228 (which several Committee members attended) and the Becoming Beloved Community Grant program which provided \$187,800 of grants across the church in three phases: 1) \$64,400 2) \$35,600 3) \$87,800.
- Á To support the fulfilment of the church's commitment to translation and interpretation, Mr. McKim met with Church COO Geoff Smith and staff as well as with Ms. Jane Cislucyis, Chair Joint Standing Committee on Governance and Operations. Ms. Cislucyis indicated that her Committee would take up the issue.
- Á Ven. Sneve presented what ECCAR does, how our work impacts Native People in the Church, and information about the Anti-Racism/Racial Reconciliation Training Framework as a tool to help them as they worked to include Anti-Racism training in their Provinces, Dioceses and Churches at Wintertalk in January of 2020.
- Á Mr. McKim participated in analysis of the Asset Map & Racial Justice Ministry Inventory (aka Diocesan Racial Healing and Justice Engagement Inventory). He and Rev. Brokenleg shared a summary of the initial review with the Committee. Eventually, the information will be loaded into the Episcopal Asset Map located at <https://www.episcopalassetmap.org/maps/diocesan-offices> so that anyone can find information about racial reconciliation efforts across the church.

The Committee's 2018 Blue Book report provided information from more of the Church on the work across the Church toward racial reconciliation than ever before. The information provided by this Asset Map & Racial Justice Ministry Inventory provides an even better picture of the work of the Church toward racial reconciliation. The data from that Inventory is still being analyzed.

The hope is that in the future staff will perform this inventory each year to fulfill the Committee's mandate of gathering this data. For the dioceses that do not respond, the hope is that ECCAR members can personally contact members of the non-responding dioceses and request the information. This will address the fact that the Committee, with its limited time and resources, has not been able to do the work annually as its mandate directs.

REPORTS TO THE 80th GENERAL CONVENTION

Mr. McKim, Rev. Kitagawa, Canon Duncan, and Mr. Rushing participated in the analysis of the Racial Justice Audit that was executed by the Mission Institute and the staff. They, along with Rev. Brokenleg, reviewed preliminary findings with the Committee.

Ven. Sneve provided input for the New Community Conference in August of 2020 which, again, brought together People of Color to discuss how to live into Becoming Beloved Community.

Mr. McKim provided input for the update of the Racial Reconciliation pages of the episcopalchurch.org website.

Through the work of each Committee member reaching out to their respective dioceses, we created a Diocesan Racial Reconciliation Contact List.

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
Province I	Province of New England	Diocese of Connecticut (Hartford)	Rev. Marjory Chapman
		Diocese of Maine (Portland)	Elizabeth Ring
		Diocese of Massachusetts (Boston)	Rev. Rebecca Black/Becky Alden
		Diocese of New Hampshire (Concord)	James McKim
		Diocese of Rhode Island (Providence)	Rev. Cara Rockwell
		Diocese of Vermont (Burlington)	Maurice Harris
		Diocese of Rhodes Island	Center for Reconciliation
		Diocese of Western Massachusetts (Springfield)	Rev. Harvey Hill/Lee Cheek
Province II	The International Atlantic Provinces or Province of	Diocese of Albany (Albany)	
		Diocese of Central New York (Syracuse)	Rev. Dr. Dena Cleaver-Bartholomew

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
	New York and New Jersey	Convocation of Episcopal Churches in Europe (Paris)	
		Diocese of Cuba (Havana)	
		Diocese of Haiti (Port-au-Prince)	
		Diocese of Long Island (Garden City)	Rev. Gabrielle Boatswain
		Diocese of New Jersey (Trenton)	Rev. Ted Moore, Canon Barbara Bach, and Canon Noreen Duncan
		Diocese of New York (New York City)	Carla Burns
		Diocese of Newark (Newark)	Jerry Racioppi
		Diocese of Rochester (Rochester)	Rev. Deacon Melanie Duguid-May & Ms. Nicole Hercules
		Diocese of the Virgin Islands (Charlotte Amalie)	Ms. Judi Shimel
		Diocese of Western New York (Buffalo)	Hon. Rose H. Sconiers & Matthew Lincoln
Province III	Province of Washington	Diocese of Bethlehem (Bethlehem)	Rev. Scott Allen
		Diocese of Central Pennsylvania (Harrisburg)	Rev. Linda Watkins 407 Greenwood Street
		Diocese of Delaware (Wilmington)	Ms. Joyce Bembry
		Diocese of Easton (Easton)	

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		Diocese of Maryland (Baltimore)	The Rev. Canon Christine McCloud
		Diocese of Northwestern Pennsylvania (Erie)	No contact person. Send inquiries to diocese
		Diocese of Pennsylvania (Philadelphia)	The Rev. Canon Toneh Smyth
		Diocese of Pittsburgh (Pittsburgh)	The Rev Michael Foley
		Diocese of Southern Virginia (Norfolk)	Ms. Lynn Farlin
		Diocese of Southwestern Virginia (Roanoke)	The Venerable Hayes-Smith
		Virginia (Offices in Richmond; cathedral shrine in Orkney Springs)	Ms. Aishas Huertas
		Diocese of Washington (Washington, D.C.)	The Rev. Canon Marsha Clark
		Diocese of West Virginia (Charleston)	The Rev. Bill Bumgarner
Province IV	Province of Sewanee	Diocese of Alabama (Birmingham)	The Rev. Angela Shepherd
		Diocese of Atlanta (Atlanta)	The Rev. Angela Shepherd
		Diocese of Central Florida (Orlando)	The Rev. Angela Shepherd

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		Diocese of the Central Gulf Coast (Offices in Pensacola, Florida; cathedral in Mobile, Alabama)	The Rev. Angela Shepherd
		Diocese of East Carolina (Kinston)	The Rev. Angela Shepherd
		Diocese of East Tennessee (Knoxville)	The Rev. Angela Shepherd
		Diocese of Florida (Jacksonville)	The Rev. Angela Shepherd
		Diocese of Georgia (Savannah)	The Rev. Angela Shepherd
		Diocese of Kentucky (Louisville)	The Rev. Angela Shepherd
		Diocese of Lexington (Lexington)	The Rev. Angela Shepherd
		Diocese of Louisiana (New Orleans)	The Rev. Angela Shepherd
		Diocese of Mississippi (Jackson)	The Rev. Angela Shepherd
		Diocese of North Carolina (Raleigh)	The Rev. Angela Shepherd
		Diocese of South Carolina (Charleston)	The Rev. Angela Shepherd
		Diocese of Southeast Florida (Miami)	The Rev. Angela Shepherd
		Diocese of Southwest Florida (Offices in Sarasota;	The Rev. Angela Shepherd

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		cathedral in St. Petersburg)	
		Diocese of Tennessee (Nashville)	The Rev. Angela Shepherd
		Diocese of Upper South Carolina (Columbia)	The Rev. Angela Shepherd
		Diocese of West Tennessee (Memphis)	The Rev. Angela Shepherd
		Diocese of Western North Carolina (Asheville)	The Rev. Angela Shepherd
Province V	Province of the Midwest	Diocese of Chicago (Chicago)	
		Diocese of Eastern Michigan (Saginaw)	
		Diocese of Eau Claire (Eau Claire)	
		Diocese of Fond du Lac (Fond du Lac)	
		Diocese of Indianapolis (Indianapolis)	
		Diocese of Michigan (Detroit)	Elizabeth Bingham, Felicity Thompson, Eric Travis (youth)
		Diocese of Milwaukee (Milwaukee)	Ed Leidel
		Diocese of Missouri (St. Louis)	Adrienne, Kurt
		Diocese of Northern Indiana (South Bend)	Terri B (diocesan staff)

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		Diocese of Northern Michigan (Marquette)	Rick S, Kath
		Diocese of Ohio (Cleveland)	Debbie
		Diocese of Southern Ohio (Cincinnati)	Margaret (diocesan staff)
		Diocese of Springfield (Springfield)	
		Diocese of Western Michigan (Portage/Kalamazoo)	
Province VI	Province of the Northwest	Diocese of Colorado (Denver)	Anthony Suggs
		Diocese of Iowa (Offices in Des Moines; cathedrals in Davenport and Des Moines)	The Rev. Meg Wagner
		Diocese of Minnesota (Offices in Minneapolis; cathedrals in Faribault and Minneapolis)	The Rev. Susan Daughtry
		Diocese of Montana (Helena)	Dr. Jamie Sherman
		Diocese of Nebraska (Omaha)	The Reverend Canon Elizabeth Easton
		Diocese of North Dakota (Fargo)	The Rev. Dr. John Floberg
		Diocese of South Dakota (Sioux Falls)	The Venerable Paul Sneve

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		Diocese of Wyoming (Offices in Casper; cathedral in Laramie)	The Rev. Roxanne Jimerson-Friday
Province VII	Province of the Southwest	Diocese of Arkansas (Little Rock)	The Rev. Sara Milford
		Diocese of Dallas (Dallas)	Rev. Oliver Lee
		Diocese of Fort Worth (Offices in Fort Worth)	Ms. Ayesha Moutope-Johnson
		Diocese of Kansas (Topeka)	Rev. Elizabeth Montes
		Diocese of Northwest Texas (Lubbock)	The Rev. Lilly Plummer
		Diocese of Oklahoma (Oklahoma City)	Rev. Joseph Alsay
		Diocese of the Rio Grande (Albuquerque)	Ms. Sondra Jones
		Diocese of Texas (Houston)	Ayesha Mutope/Denise Trevino
		Diocese of West Missouri (Kansas City)	Shirley Bolden
		Diocese of West Texas (San Antonio)	Flor Saldivar
		Diocese of Western Kansas (Salina)	Rev. Charles Kerschen
		Diocese of Western Louisiana (Offices in Pineville;	Rev. Bette Kauffman

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		cathedral in Shreveport)	
Province VIII	Province of the Pacific	Diocese of Alaska (Fairbanks)	The Rev. John Kitagawa
		Diocese of Arizona (Phoenix)	The Rev. John Kitagawa
		Diocese of California (San Francisco)	The Rev. John Kitagawa
		Diocese of Eastern Oregon (The Dalles)	The Rev. John Kitagawa
		Diocese of El Camino Real (San Jose)	The Rev. John Kitagawa
		Diocese of Hawaii (Honolulu)	The Rev. John Kitagawa
		Diocese of Idaho (Boise)	The Rev. John Kitagawa
		Diocese of Los Angeles (Diocesan seat in Echo Park district, Los Angeles; procathedral in downtown LA)	The Rev. John Kitagawa
		Diocese of Micronesia[3]	The Rev. John Kitagawa
		Diocese of Navajoland (Farmington)	The Rev. John Kitagawa
		Diocese of Nevada (Las Vegas)	The Rev. John Kitagawa
Diocese of Northern California (Sacramento)	The Rev. John Kitagawa		

REPORTS TO THE 80th GENERAL CONVENTION

Province	Name	Diocese	Diocesan Anti-Racism/Diversity/Reconciliation Contact
		Diocese of Olympia (Seattle)	The Rev. John Kitagawa
		Diocese of Oregon (Portland)	The Rev. John Kitagawa
		Diocese of San Diego (San Diego)	The Rev. John Kitagawa
		Diocese of San Joaquin (Fresno)	The Rev. John Kitagawa
		Diocese of Spokane (Spokane)	The Rev. John Kitagawa
		Diocese of Taiwan (Taipei)	The Rev. John Kitagawa
		Diocese of Utah (Salt Lake City)	The Rev. John Kitagawa
Province IX	Province of Latin America	Diocese of Colombia (Bogotá)	Francisco Duque obispoduque@hotmail.com
		Diocese of the Dominican Republic (Santo Domingo)	The Rt. Rev. Moises Quezada
		Diocese of Central Ecuador (Quito)	The Rt. Rev. Cristobal Olmedo Leon
		Diocese of Litoral Ecuador (Guayaquil)	The Rt. Rev. Victor Scantlebury
		Diocese of Honduras (San Pedro Sula)	The Rt. Rev. Lloyd Allen
		Diocese of Puerto Rico (San Juan)	Rafael Morales
		Diocese of Venezuela (Caracas)	The Rt. Rev. Orlando Guerrero

This list is available on the Episcopal Church website at https://www.episcopalchurch.org/files/eccar_diocesan_leaders_-_sheet1.pdf.

Recommending Best Practices For Dismantling Racism Training

The Committee continued the work of providing best practices for dismantling racism training by:

- developing supplements to the Anti-Racism/Reconciliation Training Framework;
- posting notices regularly on social media about GC Resolution 2018-A044 and the Anti-Racism/Reconciliation Training Framework;
- working with staff to bring together key anti-racism/reconciliation trainers and provide a select list of Anti-Racism/Dismantling Racism Training Programs now available on the episcopalchurch.org site at https://episcopalchurch.org/files/documents/en_-_anti-racism_training_programs_summary.pdf?fbclid=IwAR3DL6XeX9yITWA9kcJaNhGYtxHzzhcDSnfUWpvpbjYFJ_WJtAIKZVPXjpys including:
 - The Absalom Jones Episcopal Center for Racial Healing
 - The Anti-Racism Commission of the New Jersey Diocese
 - The Kaleidoscope Institute
 - The Mission Institute
 - The Office of Black Ministries (Episcopal Internalized Oppression Training)
 - Visions, Inc.
 - Developing a guide to attracting, recruiting, hiring, and retention of People of Color in positions throughout the church and a resolution to support it.

Collecting Information From Dioceses And Provinces About Their Successes And Challenges In Complying With The Canonical Requirements And With General Convention Resolution 2000-B049 For Providing Anti-Racism Training

As mentioned in the section Supporting the work of Becoming Beloved Community: The Episcopal Church's Long-Term Commitment to Racial Healing, Justice, and Reconciliation, the Committee worked with staff to survey dioceses in the work of anti-racism, racial reconciliation, healing, and justice. We also surveyed various dioceses ourselves.

From book reads, to pilgrimages, to use of the Sacred Ground series, to training, to facilitated conversations, the breadth and depth of the work being done is encouraging. And we are pleased that several dioceses are now beginning the work where they were not previously engaged.

We continue to caution, however, that one-to-three hour informational workshops and programs that are not a part of a coherent curriculum normally should not be used to meet the General Convention mandate of antiracism training and certification. To that end, we must continue to

spread the word about the resources available on the episcopalchurch.org web site and the training organizations that are able to provide assistance.

Information obtained from dioceses on their successes and challenges in complying with the canonical requirements and with General Convention Resolution 2000-B049 and now General Convention Resolution 2018-A045 for providing anti-racism training is described in the rest of this section.

Asset Map & Racial Justice Ministry Inventory

To collect information from dioceses and provinces about their successes and challenges in complying with the canonical requirements, and with General Convention Resolution 2000-B049 for providing anti-racism training, the Committee worked with church staff in the implementation of an Asset Map & Racial Justice Ministry Inventory (aka Diocesan Racial Healing and Justice Engagement Inventory).

Dioceses from Provinces I, II, V, and IX all submitted information to the Asset Map & Racial Justice Ministry Inventory. This information can be found at <https://www.episcopalassetmap.org/>

Several dioceses did not respond to the request for information for this year's Asset Map & Racial Justice Ministry Inventory. ECCAR members canvassed those dioceses. The results are below.

Additional Province III Reporting

Dr. Frances Dannenberg provided the following information for Province III dioceses.

<https://www.episcopalchurch.org/ministries/racial-reconciliation/racial-healing-and-justice-engagement-inventory/>.

Additional Province VI Reporting

Ven. Paul Sneve provided the following report for those Province VI dioceses that did not respond to the request for information for the Asset Map & Racial Justice Ministry

Inventory. <https://www.episcopalchurch.org/ministries/racial-reconciliation/racial-healing-and-justice-engagement-inventory/>.

Additional Province VII Reporting

Ms. Moutope-Johnson provided the following information.

ANTI-RACISM MINISTRY

EPISCOPAL DIOCESE OF TEXAS

TRIENNIAL – 2018-2021

1. September 22, 2018 Sharing our Stories ... Healing the Wounds weekend workshop

70 participants – sharing stories of racial conflict and reconciliation in their lives

Austin Heights Baptist Church, Nacogdoches, TX

In conjunction with Christ Episcopal Church, Nacogdoches, TX

Hosts:

Rev. Kyle Childress, senior pastor, Austin Heights Baptist Church

Rev. Sarah Carbajal, asste. pastor, Austin Heights Baptist Church

Rev. Dcn. Wanda Cuniff, Christ Episcopal Church

Keynote Speakers:

Dr. Stephen Cooper, professor, Stephen F. Austin State University

Rev. Dr. Brad Hauff, missionary for Indigenous Ministries, TEC

Dr. Catherine Meeks, Director, Absalom Jones Center, TEC

Panelists:

Rev. Rose Mary Joe-Kinale, Indigenous Healer, priest, Navajoland

Buzz McDonald, Caddo Nation (Kadohadocho Tribe) Oklahoma

Rev. Dr. Angela Shepherd, rector, St. Bartholomew Episcopal, Atlanta, GA

Rev. Paul Sneve, priest, Lakota Rosebud Sioux Tribe, Sioux Falls, SD

Story Weavers (story sharing facilitators, TEC):

Parker Garrett, Sandy Milien, Ellis Reyes Montes,

Clergy:

Rev. Lorraine Brown, First United Methodist, Nacogdoches, TX

Rev. Nancy Frausto, St. Luke Episcopal Church, Long Beach, CA

Rev. Dcn. Alberto Melis, St. Alban's Episcopal Church, Waco, TX

Counselors:

Dr. José Carbajal, professor, Stephen F. Austin State University

Dr. Jerry Williams, professor, Stephen F. Austin State University

Program:

Baba Runyararo Fana, Kathy Hood Culmer, Nyasha Green, Corlie Jackson, Aloma Marquis, Jeri Mills, George Patterson, Rhonda Rogers, Sister Mama Sonya, Denise Trevino

2. February 2, 2019 Seeing the Face of God in Each Other workshop

20 participants – exploring racial reconciliation and inclusion of others

Holy Comforter Episcopal Church, Spring, TX

Presenters:

Rev. Bette Kauffman, Rhonda Rogers, Alyssa Stebbing

3. February 16, 2019 Seeing the Face of God in Each Other workshop

40 participants – exploring racial reconciliation and inclusion of others

Trinity-Midtown Episcopal Church, Houston, TX

Presenters:

Don Hill, Ayesha Mutope-Johnson

More information from Province VII can be found at

<https://www.episcopalchurch.org/ministries/racial-reconciliation/racial-healing-and-justice-engagement-inventory/>.

Additional Province VIII Reporting

The following was submitted by the Rev. John Kitagawa.

"The 2019 Diocesan Convention resolved to celebrate what has historically been designated "Columbus Day" as the day the diocese will celebrate and lift up the indigenous peoples of the land. At its 2020 Diocesan Convention, the racial justice and reconciliation committee presented a plan for engaging the diocese in meaningful conversations on matters of racial justice and reconciliation, and for training. Bishop Reddall has announced that the theme for the 2022 Diocesan Convention will focus on racial justice and reconciliation."

Absalom Jones Episcopal Center for Racial Healing

The following was submitted by the Absalom Jones Episcopal Center for Racial Healing as a description of the work they have done with support from the Episcopal Church.

"In January 2018 the Center convened representatives from dioceses in Province IV to gather data on what resources the Center needed to offer. In February, the Center invited Clergy and Lay dismantling racism leaders from across the wider Church to a national conference in Atlanta. The purpose was to engage attendees in open conversation on racism, to share current work and challenges and to encourage a commitment to long-term work on racial healing, reconciliation and justice. The conference featured speakers including The Rev. Stephanie Spellers, Canon to the Presiding Bishop for Evangelism, Reconciliation, and Creation Care, others on the Bishop's staff and representatives from Honduras in Province IX. Forty-five (45) dioceses sent representatives.

The Center's work of dismantling racism and racial healing has taken us down many paths as demonstrated when the founding executive director, Dr. Catherine Meeks increased our visibility

during the 79th General Convention in Austin, TX. She spoke to the House of Bishops and Deputies during a TEC Talk and also hosted a luncheon for deputies with speakers Chuck Wynder, Jr. and Heidi Kim from Presiding Bishop Curry's staff and Bishop Robert Wright of the Diocese of Atlanta. The Center also had an exhibit booth visited by hundreds in the Convention Expo Hall.

There are numerous examples of the Center's work: dismantling racism workshops, racial healing conversations, memorials and services to remember the lynched, justice pilgrimages, intergenerational projects, programs with local HBCUs, establishing a reading room, the Center's first ever International Women of Color and Wellness conference, and the list goes on. With God's help the future of the Center will be bright but it depends on all of us working tirelessly to address the ills that plague our society.

In order to support the future work, we have founded the Bishop Barbara C. Harris Justice Project, begun a Reimagining Policing initiative, and formed partnerships with the Virginia Theological Seminary, CDSP and the Seminary of the Southwest to create an enhanced dismantling racism curriculum. New educational offerings are on the horizon: 1) developing a culturally appropriate dismantling racism curriculum for Latinx communities and delivering these workshops in the most accessible and technological manner and 2) developing a K-5 dismantling racism curriculum. The creation of a new website offering virtual resource pages for African Americans, Asians, Native Americans and Latinx supports our intention to be more inclusive. Along with this, the Center moved all of its major programming to an online format in response to the Covid-19 Pandemic. This resulted in the doubling of the database, expanding the program audience across the United States and internationally, and enhancing individual donations. The response to the Center's online programming clearly demonstrates that live streaming of all major programs will need to be included when we return to onsite programming following Covid-19."

GC Resolution 2018-A045

Maintain a Register of participants in training

In fulfillment of this mandate from GC Resolution 2018-A045, we are working to identify the lists from those groups within the church. In addition, we designed a Certification Process that would facilitate gathering this information with less work by those groups. We are working with staff to complete its implementation.

That the Executive Council Committee on Anti-Racism and The Episcopal Church staff and The Absalom Jones Episcopal Center for Racial Healing and Christian Formation professionals be encouraged to work together to continue to expand the resources

In fulfillment of this mandate from GC Resolution 2018-A045:

- Á ECCAR began the development of Supplements to the Anti-Racism/Reconciliation Framework document produced last triennium to provide guidance for delivering training to

audiences with specific racial compositions: Latino/Hispanic, Asian-American, Native American, African-American (includes Caribbean-American), mixed.

- Á ECCAR worked with staff to organize the Episcopalchurch.org racial reconciliation pages and provide additional resources on best practices;
- Á The Absalom Jones Episcopal Center for Racial Healing created a Virtual Resource Center on its website with resources dedicated “to educate, inspire, and prepare you to advance racial healing for Latino/Hispanic, Asian-American, Native American, and African-American people”.

Proposed resolutions

A049 Host and conduct a second Building Beloved Community Conference by or before 2024

A050 Support collaborative efforts with Equal Justice Initiative (EJI to place historical markers

A051 Improve recruitment, hiring, appointment retention and representation of People of Color within The Episcopal Church

A052 Revise the Mandate of the Executive Council Committee on Anti-Racism and Reconciliation

Continuance recommendation

We support GC Resolution 2015-A023, Authorize Continuation of the Executive Council Committee on Anti-Racism & Reconciliation as passed which authorizes the continuation of the Committee through 2023.

EXECUTIVE COUNCIL COMMITTEE ON HBCU

Membership

The Very Rev. Canon Dr. Martini Shaw, <i>Chair</i>	Pennsylvania, III	2021
Dr. Scott Evenbeck, <i>Vice-Chair</i>	Indianapolis, V	2021
Dr. Martha Bedell Alexander	North Carolina, IV	2021
The Rev. Canon James Callaway, D.D.	New York, II	2021
Dr. Joel Cunningham	Tennessee, IV	2021
Dr. Anita George	Mississippi, IV	2021
The Rev. Dr. Canon Michele Hagans	Washington, III	2021
The Rev. Dr. Eugene Lowe	New York, II	2021
The Rt. Rev. Andrew Waldo	Upper South Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Dr. Sean Decatur, resigned 12/2020

Mandate

2015 - AN028

Resolved, That the Executive Council establishes a committee of Executive Council from the task group formed January 11, 2015 to continue to support and understand the role of Historically Black Colleges and Universities and the important relationship with The Episcopal Church; and be it further

Resolved, That the Executive Council charges the committee to explore and make recommendations to Executive Council by General Convention 2021 the long-term needs of the HBCUs to ensure access to students of color for future generations; and be it further

Resolved, That the Executive Council authorizes a budget up to \$15,000 for this triennium for the work of the committee with composition to consist of the current membership of the task group and

that the committee may consist of eight to ten members jointly appointed by the Presiding Officers and provide to Executive Council an annual report at the June meetings of Council; and be it further Resolved, That the Executive Council expresses gratitude to the members of the task group for their contributions in forging an important relationship between TEC and the schools and requests a report of the accomplishments of the task group to date be prepared by the end of 2017.

Summary of Work

The HBCU Task Group was appointed by the Executive Council at the direction of a resolution in January 2015: that the Executive Council "... requests the Presiding Officers appoint a task group to consider how the Episcopal Church can better support Historically Black Colleges and Universities, including financial, administrative, leadership, and other forms of support." The two remaining Episcopal HBCUs are St. Augustine's University in Raleigh, NC and Voorhees College in Denmark, SC. The Executive Council Committee on HBCUs, chaired by the Very Rev. Martini Shaw, has met via teleconference and Zoom approximately ten times per year in the triennium. (Minutes of all meetings are filed in the GCO extranet.)

In 1865, The Episcopal Church's General Convention organized the Protestant Episcopal Freedman's Commission (renamed the Commission of Home Missions to Colored People in 1868), to establish schools in the South that would provide higher education and religious instruction to African Americans.

The American Church Institute for Negroes (ACIN), founded in 1906, was renamed the American Church Institute (ACI) in 1961. It was established to coordinate church-affiliated schools and refocus attention on the educational needs of men and women of color. The ACIN administered schools and colleges dedicated to the education of African Americans in the South to fulfill the Church's mission to close the gap between educational opportunities for African Americans and whites. In 1924 the Institute agreed to support the Voorhees College as its South Carolina member, beginning the Episcopal Church relation that continues today.

ACI began its work three years prior to the founding of the NAACP and dissolved three years after passage of the Civil Rights Act of 1964. During those years, ACI witnessed a major shift in American society's approach to rights for African Americans, from a "separate but equal" segregation-based policy, to a growing movement toward a racially-integrated society at all levels, including education. While ACI's decision to cease its oversight of schools arose from concern that it was supporting

segregated education, its positive contributions to higher education for African Americans remain. Since 1965 support for the remaining Episcopal HBCUs has been provided through General Convention allocations, drawing on remaining ACI endowments and general church funds.

In the days of segregation, HBCUs were the primary means for black students to receive higher education. While the civil rights movement overcame that exclusion, inadequate public education continues to leave a large cohort of students of color underprepared for higher education, a vulnerable niche which HBCUs are serving admirably. In the words of Bishop Curry in the 2020 Absalom Jones appeal:

Many faithful Episcopalians have been asking me what they can do during this time of twin pandemics the coronavirus pandemic and the pandemic of racial injustice in America – to make a real difference. – One way to make that difference is to invest in a better future for young people. HBCUs create dynamic and empowering educational environments for college students from diverse backgrounds. Now more than ever these institutions need our support.

The HBCUs Committee has been consistently focused on providing advice and support to the two Episcopal HBCUs the church supports with block grants, St. Augustine's University in Raleigh NC and Voorhees College in Denmark, SC, both small institutions with historic missions serving the Black community which sustain important connections with The Episcopal Church. As is true across HBCUs, their budgets are largely tuition driven, so enrollment numbers are key factors in institutional viability. Compared to other denominations, such as Lutherans and Methodists, Episcopal Church support for our HBCUs is low. We are working with Ms. Malm in the church's Development Office to assist advancement efforts at Voorhees and St. Augustine's to reach out for greater church recognition and support from congregations, dioceses and Episcopal donors.

The committee liaises with bishop trustees of both institutions, along with their leadership and chaplains. The Saint Augustine's University board includes the bishops of the three North Carolina dioceses, while the Voorhees board includes the two in South Carolina. This year we welcomed the Rev. Hersey Mallette Stevens as chaplain at St. Augustine's. St. Augustine's University was tragically struck this October with the sudden death of its newly installed president, Dr. Irving McPhail, who died from COVID after a most promising three months in office. Widely recognized for his work in lifting minority students in the fields of science, technology, engineering and math, Dr. McPhail had quickly drawn together faculty and students. Voorhees College is also coming into transition at the end of the year when Dr. E. Franklin Evans, who turned declining enrollment around in 2016, departs to become the first black president of West Liberty State University in West Virginia. Voorhees, which had gone online in the fall, is planning to reopen to students in February 2021. The board named Provost Dr. Ronnie Hopkins as Acting President to lead the reopening in January, which was assured

in December when Voorhees received a surprise \$4 million grant from MacKenzie Scott's blockbuster no-strings gifts to 384 organizations. It was chosen as one of about a dozen promising HBCUs. It was by far the largest gift Voorhees has received.

The committee has worked with a TEC consultant (Lang Lowery), and with each institution, to help develop plans for student recruitment generally and for Episcopal students in particular. We have also received support from TEC development directors (Tara Holley until 2017 and Cecilia Malm), who connect the office of the presiding bishop with the administration of both institutions. Ms. Malm directs the Annual Absalom Jones Appeal dedicated to the two schools, which in 2020 raised \$50,000. In each committee meeting we address challenges and opportunities that the two institutions are facing to provide effective advice about strategies for moving forward. We have also advised St Augustine's on important issues related to its accreditation.

The committee has been particularly focused on supporting and engaging the chaplains in both places, and on working in conjunction with the cognizant bishop, seeking to provide stronger institutional buttressing for their work. The committee is considering dedicating a portion of the TEC continuing appropriation for the support of chaplaincy in each institution.

Both St Augustine's University and Voorhees College continue to provide remarkable opportunities for students with special higher education needs and desires. Especially in the tumultuous COVID environment, they face difficult headwinds in terms of marketing, enrollment consistency, and board and senior leadership. The pandemic has exacerbated their every vulnerability. The committee embodies the continuing care of The Episcopal Church for these two communities who carry the history and hope of our quest for the beloved community.

Proposed resolutions

A053 Ensure the vital role of the Episcopal HBCUs in building The Beloved Community

Continuance recommendation

In the first five years, the HBCU Committee has addressed its charge from the Executive Council "to consider how the Episcopal Church can better support our Historically Black Colleges and Universities, including financial, administrative, leadership, and other forms of support." In working with St. Augustine's University and Voorhees College, we found a disconnect between ongoing church budgetary support and building deeper community support and recognition with these complex institutions. We see this committee as an essential link to productive futures for both church and colleges, and call for ongoing continuance of the committee until the 82nd General Convention.

The HBCU requests \$20,000 for the triennium to allow the resumption of on site visits to the two colleges, approximately one visit per year.

UNITED THANK OFFERING BOARD

Membership

Ms. Ms. Sherri Dietrich, <i>Chair</i>	Maine, I	2024
Ms. Joyce Landers, <i>Vice-Chair</i>	Central Gulf Coast, IV	2024
Ms. Kathy Mank, <i>Financial Secretary</i>	Southern Ohio, V	2024
Ms. Lorraine Candelario Moctezuma	Puerto Rico, IX	2024
Ms. Rosamond Daniels	Washington, III	2021
The Rev. Caitlyn Darnell	North Carolina, IV	2021
Ms. Gail Donovan	Michigan, V	2024
Ms. Diane Gabbard	Kentucky, IV	2024
Ms. Sedona Jacobson	Navajoland Area Mission, VIII	2024
Ms. Jane Jellison	Rhode Island, I	2021
Ms. Hilda Lammar	Dominican Republic, IX	2021
Ms. Kate Mietus	Spokane, VIII	2024
Ms. Maggie Noland	Alabama, IV	2024
The Rev. Christine Plantz	Nebraska, VI	2021
Ms. Vernese Smith	Long Island, II	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

The United Thank Offering (UTO) is a ministry of The Episcopal Church for the mission of the whole church. Through UTO, individuals are invited to embrace and deepen a personal daily spiritual discipline of gratitude. UTO encourages people to notice the good things that happen each day, give thanks to God for those blessings and make an offering for each blessing using a UTO Blue Box. UTO is entrusted to receive the offerings, and to distribute 100% of what is collected to support innovative mission and ministry throughout The Episcopal Church and Provinces of the Anglican Communion.

Summary of Work

The United Thank Offering (UTO) Board, rooted in prayer and gratitude and guided by the principles of the Theology of Thankfulness and 138 years of teaching and promoting gratitude, gave priority to the following areas during the 2019-2021 triennium:

- Supporting our grassroots network
- Increasing the annual Ingathering and participation in the spiritual discipline of gratitude
- Granting the annual Ingathering

The Board met in person two times: 2019 in Los Angeles and New Orleans. During each meeting, the Board conducted business, visited/learned about grant sites and met with local Episcopal Church Women and United Thank Offering volunteers. While in New Orleans, the Board offered trainings and workshops alongside the Missional Voices gathering and participated in anti-racism training geared toward the work of the Board.

Members of the Board also met online regularly to address the work set before the Board between meetings in addition to offering webinars monthly on a variety of topics, online events during the pandemic, and work in small groups.

Below is a summary of how we addressed the three goals for this triennium as listed in our previous Blue Book report.

Supporting the Grassroots Network

As the Grassroots network of UTO continues to change, grow and strengthen, we spent time this triennium identifying where we needed to build up UTO coordinators and new practices to best equip and support their ministry. With that in mind, we created online training for coordinators including faith formation opportunities offered by theologians from around The Episcopal Church. We also streamlined donation processes in the hopes that funds would not get forgotten in Diocesan accounts or lost at in-person collections. Prior to the pandemic, we were able to offer one in-person training which also allowed us to pilot a UTO Children's Program on Gratitude that was then further refined for use at General Convention with the Children's Program there and then for congregations to use.

With the help of UTO leaders in Province 9, we began to develop materials in Spanish that are downloadable for easier use and lower cost locally. We also worked on updating our online donation

capacity so that the form would be in Spanish. We continue to look for ways to support Spanish speakers in applying for UTO grants given the cost of translation services for the applicant.

Increasing the Annual Ingathering and Participation in the Spiritual Discipline of Gratitude

Updated Materials, Participation in Events

This Triennium, the Board and Staff worked to address deficiencies in our systems. We created a donor acknowledgment system for the Ingathering that also allowed us to better update dioceses on their giving throughout the year and not just at the end. We partnered or participated in other events; from the Young Adult Festival at General Convention, to Rooted In Jesus, UTO showed up to talk about gratitude and to support Episcopalians in learning how to better write and apply for grants not only from UTO but beyond. During the Triennium the Board has dedicated funding and time to increasing participation in the spiritual discipline of gratitude. We've created new materials, videos, and resources for congregations. We also updated our blog and worked with the DFMS IT department to transfer hosting and support more information being available on the blog. We also transferred the Blue Box app and updated it for General Convention.

UTO Pilgrimage

Our first pilgrimage—UTO Pilgrims on the Camino—took place in October of 2019, and 34 people from around the U.S. enjoyed an inspiring journey through Spain, seeing firsthand the wonderful work that has been and is being done in Spain with UTO grants. The pilgrimage was a great success and more pilgrimages are in the planning stages.

UTO Scholars Conference

In 2020, UTO partnered with Bexley Seabury Seminary in Chicago and the Anglican Theological Review to host the first ever Scholars Conference on gratitude. The Rev. Dr. Diana Butler Bass was the keynote presenter and six scholars from across The Episcopal Church were chosen to present academic papers on the topic of gratitude. Originally the conference was to be held in Chicago in April 2020; however, the conference moved online in order to keep everyone safely at home. The conference was attended by over 300 people with an additional 300 people accessing the videos later. A study guide is now available to go along with the videos and in the fall of 2021 the papers will be published in ATR along with two other scholarly pieces.

The Great EpisGOpal Race

In the midst of the Pandemic, the Board wanted to find a way to encourage people to practice gratitude and to safely get outside or exercise. UTO partnered with the Diocese of South Dakota to create a virtual race to support the 2020 Ingathering. 298 people participated in the race and together raised over \$18,000. The race was such a popular experience, we look forward to offering it annually.

Granting the Annual Ingathering

The Board continues to review the annual granting process, understanding the importance of finding ways to have clearer criteria and expectations as well as a more accessible application process to ensure that those who are in most need of UTO funds to support innovative ministries have the opportunity and ability to apply for those funds. We will continue to work with Executive Council and DFMS on transparent systems of accountability for the granting process.

Granting the Annual United Thank Offering Ingathering

In 2018, UTO awarded the first grants to support Becoming Beloved Community and Racial Reconciliation in The Episcopal Church for a total of \$1,283,216.²¹ The Board awarded 10 grants to Young Adults and Seminarians and 34 grants through the annual process. Then in 2019, UTO awarded \$1,535,740.⁵⁵ grants to support efforts in “Go: Crossing boundaries created by race, culture, and economics to create communities that listen deeply and learn to live like Jesus” through 6 grants to Young Adults and Seminarians and 33 grants through the annual process. In 2020, UTO awarded grants to support “Bless: Share faith, practice generosity and compassion, and proclaim the Good News of God in Christ with hope and humility” in The Episcopal Church for a total of \$1,548,013.⁶⁶. The Board awarded 7 grants to Young Adults and Seminarians and 27 grants through the annual process. In 2020 the world changed, and with the global pandemic, the Board quickly pivoted to award the 2021 Ingathering to support any and all efforts to address the COVID-19 pandemic. The Board was in the process of receiving applications for the first round of COVID-19 grants at the deadline for this report.

Each year the Board receives requests for more money than UTO has available to grant. It is our hope to strengthen and increase the ingathering so we can support more ministry initiatives throughout the Episcopal Church and the Anglican Communion.

UTO Board PRIORITIES FOR THE 2022-2024 TRIENNIUM

1. More fully embody UTO's mandate as a ministry for the mission of the whole church

UTO will expand its support for the mission of the whole church through partnerships with other Episcopal Church groups and ministries, serving to expand awareness of and outreach by all of the partners involved. Episcopalians know about UTO's grant-giving work but will be introduced to or reminded of its central ministry of gratitude and how gratitude is important in all the work of the Church.

2. Review the granting process and work on acquiring granting software

The Board regularly reviews and updates the granting process and wants the whole granting process to be as transparent, equitable, and accommodating as possible. There are various granting software programs available that could make this essential UTO function more straightforward for both grant applicants and the Board.

3. Rework processes to replace the former functions of ECW where necessary

Many dioceses no longer have functional Episcopal Church Women groups, which necessitates changes in some of the ways UTO has operated at the grassroots and higher levels, including elections to the UTO Board, selection and training of UTO coordinators, and other areas.

ANGLICAN-ROMAN CATHOLIC DIALOGUE IN THE USA

Membership

The Rt. Rev. John Bauerschmidt, <i>Chair</i>	Tennessee, IV	2021
The Rev. Dr. Michael Cover	Dallas, VII	2021
The Rev. Dr. Daniel Joslyn-Siemiatkoski	California, VIII	2021
Dr. John Kiess	Maryland, III	2021
Dr. Donyelle McCray	Connecticut, I	2021
The Rev. Canon Dr. C. Denise Yarbrough	Rochester, II	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rt. Rev. Catherine Waynick resigned in 2020, and was replaced by Dr. Donyelle McCray.

Mandate

Resolution 2018-A036

Resolved, That the 79th General Convention joyfully affirms the continuation of the ecumenical dialogues in which The Episcopal Church is engaged: the Presbyterian Church (USA)-Episcopal Dialogue; the Anglican-Roman Catholic Dialogue (ARCUSA), noting particularly a renewed round of conversations; and the work toward full communion with the United Methodist Church; and be it further

Resolved, That this Convention joyfully affirms the continued coordinating committee work with our full communion partners, the Evangelical Lutheran Church in America and the Moravian Church (Northern Province and Southern Province); and be it further

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Summary of Work

Over fifty years the Consultation has issued a number of statements concerning a range of topics. These have included the doctrine of the Eucharist, the Ordination of Women, and a response to the Anglican-Roman Catholic International Commission's 1998 document "The Gift of Authority." Most recently in 2014 the Consultation produced the statement "Ecclesiology and Moral Discernment." The statements are collected on the website of the United States Conference of Catholic Bishops, under the "Anglican" tab of the Ecumenical Documents and News Releases, at this link: <https://www.usccb.org/committees/ecumenical-interreligious-affairs/ecumenical-documents-and-news-releases#tab--anglican>.

Work now centers on a new agreed theme: "Reconciliation in Holy Scripture and Christian Tradition." Under this topic the theological, pastoral, and personal implications of reconciliation for our two churches are being considered. This includes a section examining the nature of reconciliation through scriptural, historical, and theological perspectives, and also particular attention to reconciliation in the world, within the churches, and between the churches. Particular consideration is being given to issues that are potentially church-dividing and those that are not.

After a period of reorganization following the issuing of the 2014 statement to allow for agreement on a new theme and for new appointments by both churches, the Consultation began to meet again in 2017. An inter-disciplinary group of theologians were assembled as members to resource the work. Three meetings were held prior to the General Convention of 2018.

The Consultation has continued to meet during the present triennium. Meetings were held November 28-30, 2018, at the Bosque Center in Albuquerque, NM; April 4-6, 2019, at the Mercy Conference and Retreat Center in St. Louis, MO; and December 16-18, 2019, at the Nicholas Center in Chicago, IL. Since the beginning of the pandemic work has continued by video conference, and the Consultation met virtually on April 16-17, 2020, and again on September 24-25, 2020. Another video conference is planned for April 2021.

Developments within our society and the world have made the subject of Reconciliation even more important than could have been foreseen in 2015. Work continues on preparation of an agreed statement on this subject, now focused on specific topics. These include racial reconciliation; reconciliation between the churches; reconciliation between religious faiths; social and political reconciliation; gender reconciliation; and environmental reconciliation.

The members of the Consultation are encouraged at the progress that has been made on this broad topic, and the ways in which we have been able to come to agreement in many areas. We look forward to continuing and completing this valuable work in the next triennium.

MORAVIAN EPISCOPAL COORDINATING COMMITTEE

Membership

The Rev. Canon Maria Tjeltveit, <i>Chair</i>	Bethlehem, III	2021
The Rev. T. Scott Allen	Bethlehem, III	2021
Mrs. DeDreana Freeman	North Carolina, IV	2021
The Rt. Rev. Kevin Nichols	Bethlehem, III	2021
The Rt. Rev. Samuel Rodman	North Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

The Rev. Margaret Rose, Deputy for Ecumenical and Interreligious Relations

Mr. Richard Mammana, Associate for Ecumenical and Interreligious Relations

Mandate

Resolution 2018-A036

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the Anglican Church of Canada, and the Evangelical Lutheran Church in Canada, and commends the members of these churches for the work they have done together and the statements and study documents they have jointly issued.

Summary of Work

The Moravian-Episcopal Coordinating Committee (MECC) met in Bethlehem, PA, September 23-25, 2019, and by Zoom, on November 11, 2020.

Following are the goals for the triennium (in bold) with the actions taken listed below each goal:

Tell the Story of Moravian-Episcopal Full Communion

- Articles were written and submitted for the Episcopal News Service and Moravian publications

Encourage connections at the national/provincial leadership level [note: “provincial” in this context refers to the Northern and Southern Provinces of the Moravian Church in America, not the provinces within the Episcopal Church]

- Met with the leaders of the Moravian Board of World Mission, which does disaster relief work as well as mission. Facilitated an initial Zoom meeting between members of Episcopal Relief and Development and the Moravian Board of World Mission to discuss ways of working together.
- Helped connect the leadership of the Northern Province of the Moravian Church, who are developing anti-racism resources, with Dr. Catherine Meeks, Executive Director of the Absalom Jones Center for Racial Healing. She guided their leaders on a pilgrimage to Montgomery, AL, in February 2020.

Encourage connections at the judicatory/diocesan/regional level

- A Moravian pastor serves an Episcopal congregation in the Diocese of Western North Carolina, as part of the full communion exchange of clergy.
- A conference on welcoming refugees was planned by Episcopal, Moravian, and Lutheran leaders in the Diocese of Bethlehem for April, 2020. It was postponed due to the pandemic.
- Episcopal clergy joined the Moravian celebration of the Cup of Covenant (a celebration of Jesus Christ as the Chief Elder of the Moravian Church) which included a reaffirmation of ministry, observed on September 13 each year.

Encourage connections among Moravian, Episcopal, and Lutheran congregations

- An Episcopal parish and a Moravian congregation in Allentown, PA, did the *Sacred Ground: A Film-based Dialogue on Race and Faith* together (by Zoom) in the fall of 2020.

Work more closely with other Coordinating Committees

- At the September, 2019 meeting, MECC had discussions with leaders of the Lutheran-Moravian and Lutheran-Episcopal Coordinating Committees to learn about best practices and how we can work together. We explored whether there might be a time to move to one coordinating committee for all three full communion partners. Plans for a joint meeting were postponed due to some transitions in those Coordinating Committees as well as the pandemic.

Plan a 10th anniversary observance of our full communion relationship

- A Liturgy of Christian Unity Service is being created for February 10, 2021, to celebrate the 10th anniversary of full communion. It will include the Presiding Bishop and the Presidents of the Provincial Elders Conferences of the Northern and Southern Provinces of the Moravian Church.
- MECC is working with ChurchNext to develop an online class on Moravian and Episcopal full communion.

The Moravian-Episcopal Coordinating Committee looks forward to continuing to help our two denominations work together to strengthen our common witness to Jesus Christ and Christ's mission in the world.

PRESBYTERIAN EPISCOPAL DIALOGUE COMMITTEE

Membership

The Rt. Rev. Eugene Sutton, <i>Chair</i>	Maryland, III	2021
Dr. Michael Booker	Missouri, V	2021
The Rev. Canon Elise Johnstone	Lexington, IV	2021
Ms. Elizabeth Ring	Maine, I	2021
The Rev. Joseph Wolyniak	Colorado, VI	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Representation at General Convention

The Rt. Rev. Eugene Sutton; The Rev. Canon Elise Johnstone; Dr. Michael Booker

Acknowledgements

The Deputy for Ecumenical and Interreligious Relations, The Rev. Margaret Rose, and the Associate for Ecumenical and Interreligious Relations, Mr. Richard Mammana; The Presbyterian members of the Dialogue: Ruling Elder Anne Bond (co-chair), the Rev. Dr. Neal Presa (co-vice chair), the Rev. Terri Ofori, the Rev. Dr. Christian Boyd, the Rev. Robert Foltz-Morrison, the Rev. Brooke Pickrell, the Rev. Brian Entz, and Ruling Elder Dr. Dianna Wright serving as staff liaison.

Mandate

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Summary of Work

Meetings

The bi-lateral dialogue committee typically meets twice each year, with the first meeting of the triennium in Fall 2019 hosted by the Episcopalians at the Community of the Transfiguration in Glendale, Ohio, then, in a meeting hosted by the Presbyterians in February 2020 in San Diego, California. Due to Covid-19, our meeting in the Fall of 2020 occurred via video conference, and it is planned that the February 2021 meeting occur via video conference as well.

Background

A good foundation was built by the dialogue team prior to 2018 around understanding the concept of *episkopé*, polity, theology, and membership in both The Episcopal Church and the Presbyterian Church (USA), as well as a review of ministries and missions that already exist between the two bodies. The bi-lateral dialogue committee, beginning in Fall 2019, was able to establish that our ecclesial communions could work toward a path of increased ministry together, especially in the localities where there is great need for collegial partnership, be that more rural areas or in urban or ethnic ministries. It is with the good foundation of several years of previous bi-lateral dialogue and the recognition that Episcopalians and Presbyterians have already been doing good, faithful, and active ministry and mission together in numerous formats, as well as the needs of a changing Church that brought the bi-lateral dialogue to present the following report for the consideration of the 80th General Convention and the 225th General Assembly of the Presbyterian Church(USA).

Proposed resolutions

A055 Receive and Study Proposal of Ecumenical Dialogue with Presbyterians (PCUSA)

Episcopal-Presbyterian Agreement on Local Sharing of Ministries

PREAMBLE: The Urgency of the Times

Such a Time as This

The Book of Esther recalls a time of great challenge. Likewise, our current time finds our world amid many challenges, including a global pandemic with still yet unknown overall effects on the Church. The global Christian Church around the world has found itself in a season of reinvention and redefinition. The events of 2020 have called us to ask ourselves what it truly means to be Christian. Individual congregations have been challenged to adapt to a changing world in ways that have shattered our links with the past and old ways of doing church. In so doing, we have focused on the core duties of being Christ in the world. This has created both challenges and opportunities.

Global Pandemic and Racial Endemic

Our time stands in particular need of unity. Both the Presbyterian Church (U.S.A.) and the Episcopal Church acknowledge the historical and present reality of sin of racism and white supremacy that denies the impartiality of God, the reconciling work of Christ, the gift of the Holy Spirit poured forth into all persons. Both bodies acknowledge their complicity and that they are called to end all racial discrimination, repenting and ministering to those injured by it. We cannot remain silent about this divisiveness, nor did Jesus: “Recognizing what they were thinking, Jesus said, ‘Any country that divides itself into groups which fight each other will not last very long.’” (Matt 12.25, GNT). Reform always comes from the margins, whether it be that prophetic voice crying in the wilderness or activists on city streets protesting the death of another person of color as if Black lives do not matter.

Accordingly, there is a present and historical urgency borne in this agreement is to move both churches toward that unity in mission. The triune mission of God is the foundation of the church’s unity and its mission in the world. It is among the last of Jesus’ prayers: “That they may all be one, just as you, Father, are in me, and I in you, that they also may be in us, so that the world may believe that you have sent me.” (John 17.21, ESV)

This document represents the culmination of many decades of dialogues between the Episcopal Church in America and the Presbyterian Church (USA).⁽¹⁾

The Church, guided by God’s wisdom, can embrace this opportunity and examine how ecclesial bodies can work together.

Supplemental Materials

Table of contents:

1. [Episcopal-Presbyterian Agreement on Local Sharing of Ministries](#)

Episcopal-Presbyterian Agreement on Local Sharing of Ministries

Tearing Down Ecclesiastical Barriers

Old walls had prevented mission and ministry together, and in this time of notable change, the participants of the bi-lateral dialogue between the Episcopal Church and the Presbyterian Church (USA) invite our ecclesial bodies to consider this limited exchange agreement on the local sharing of ministries for passage at the General Convention and General Assembly.

The old walls preventing work together have been torn down through a vastly changing world and church context. With the foundation of the 2008 Episcopal Presbyterian Agreement, our common full communion partners of the Evangelical Lutheran Church in America, and the Moravian Church (Northern and Southern Provinces), our work together through Churches Uniting in Christ, work together in public witness as well as numerous collaborative local ministries, a pathway has been created for continued mission and ministry together, toward the unity that God calls us to.

Thus, the Presbyterian/Episcopal Dialogue requests our respective authorizing bodies to consider the following Agreement; to continue the Dialogue with future deliberations; and that both of our Heads of Communion commit themselves publicly to this effort and to consider a public celebration of our progress to date and our hope for the future.

Psalm 133:1 Oh, how good and pleasant it is, when kindred live together in unity! (St. Helena Psalter)

INTRODUCTION ⁽²⁾

The Church does not live for itself. It is called into being by the Gospel of Jesus Christ to serve the mission of the triune God in the world. 'The Church belongs to God. It is the creation of God's Word and the Holy Spirit. It cannot exist by and for itself.'⁽³⁾ The mission of God is a single, all-embracing mission which confronts the Church with a range of complementary tasks. Impelled by the joyful duty of giving praise and thanks to God for all the blessings of creation and redemption, the Church seeks to serve God by making known the Good News of salvation and by meeting human need wherever it finds it. In accordance with God's purpose to 'gather up all things in Christ' (Eph. 1:10), the Church is called to embody in an anticipatory way the reconciliation and communion of all people.

The Church knows well that its mission is compromised at every point by its disunity, which continues at many levels despite the great ecumenical achievements of the last century. How can the Church credibly proclaim the unity of humankind when it is too fractured to recognize a common baptism and to gather around one eucharistic table in the one apostolic faith? We have institutionalized divisions in the Church and come to accept them as normal, forgetting that they

are a stumbling-block and a barrier to faith for many. We overlook the fact that they stand in conflict with the will of Christ and amount to a refusal of the unity which is his gift.

The witness of the Church – its service of the mission of God – will be greatly enhanced by the overcoming of historic divisions between the churches⁽⁴⁾. The removal of barriers between our two churches, The Episcopal Church and the Presbyterian Church (USA), while not providing an instant or complete solution to the problems and challenges confronting the Church, will be a step of great importance, especially when seen together with other comparable steps being considered by our churches. In many places in rural and urban parts of the United States, for example our churches have diverse communities that have benefited greatly from the sharing of ordained ministries.

Missionally, our two churches could expand in joint planting of new worshipping communities, as well as a partner in union or federated parishes which are referred to as ecumenical congregations⁽⁵⁾. The matter is not less urgent, nor are the advantages less significant, in the deepening of our covenant relationship in order to establish new eucharistic communities and mission projects which feed the body, mind, and souls of God's people.

The proposals in this paper have been formulated out of our obedience to the Gospel and the better discharge of our call to mission. Unity is for the sake of mission. Changes in the socio-economic pattern of life in the U.S. in recent years provide an opportunity to develop the unity between our two churches. When Christians demonstrate in their lives that the barriers which divide the rest of society do not divide the Church, the Gospel is proclaimed. We may be certain that we are called, together, to grow in mission, the mission of the Church, within the mission of the triune God.

AFFIRMING THE CURRENT ECUMENICAL AGREEMENT

This group affirms the current Episcopal Presbyterian Agreement of 2008. Among these were:

- We acknowledge one another's churches as churches belonging to the one, holy, catholic, and apostolic Church;
- We acknowledge that in our churches the Word of God is authentically preached and the sacraments of Baptism and Eucharist are duly administered;
- We acknowledge one another's ordained ministries as given by God and instruments of grace, and look forward to the time when the reconciliation of our churches makes possible the full interchangeability of ministers;
- We acknowledge that personal and collegial oversight (episcopate) is embodied and

exercised in our churches in a variety of forms, episcopal and non-episcopal, as a visible sign of the Church's unity and continuity in apostolic life, mission, and ministry.

- We agree that The Episcopal Church will invite members of the Presbyterian Church (USA) to receive Holy Communion in their churches and the Presbyterian Church (USA) will invite members of The Episcopal Church to receive Holy Communion in their churches. We encourage the members of our churches to accept this Eucharistic hospitality and thus express their unity with each other in the one Body of Christ.

In short, we recognize and affirm the validity of one another's churches which provide for their covenant communities word and sacrament, ordered ministries, as well as the embodiment and exercise of the ministry of oversight (communally, collegially, and personally). However, due to the divergence in our equally valid ecclesiastical polities, and to some extent, existing church traditions and customs limit interchangeability of ordered ministers, and thus full communion, at this time.

Despite this recognition, this group believes it has prayerfully discerned a way forward through which our two churches may continue to journey together in a complementary manner and enriching each other as we participate in the mission of God.

THE WAY FORWARD

In our current agreement, our two churches agreed "that authorized ministers of our churches may, subject to the regulations of the churches and within the limits of their competence, carry out the tasks of their own office in congregations of the other churches when requested and approved by the diocesan bishop and local presbytery." Furthermore, a conditional was established on this point of agreement that "because we do not yet have reconciliation and full interchangeability of ordained ministries, all authorization for these special opportunities must conform to the Book of Common Worship and the Book of Order of the Presbyterian Church (USA), and the Book of Common Prayer and the Constitution and Canons of The Episcopal Church."

Our current agreement also calls the two denominations to "encourage diocesan bishops and presbyteries to provide a regular occasion for planning, discussing, resourcing for missional, educational and liturgical life together. In addition, to explore possibilities for new church development and redevelopment together," as well as provide a process to support and implement the above recommendations (guidelines).

Our two churches have agreed to be in dialogue for the specific purpose of considering the question of the mutual recognition of ordained ministries, as a step towards the unity that is

Christ's will for his Church. Our current agreement enabled The Episcopal Church and the Presbyterian Church (USA) in June of 2017 to formally and publicly participate in the Churches Uniting in Christ recognition of ordered ministry. This public proclamation underscores and casts away possible barriers of our current agreement to move forward in missional partnership.

On the basis of converging but not yet wholly compatible understandings of the ordained ministry, and sufficient agreement in faith and ministry, together with a marked growing together of our two churches over recent decades, this group proposes that our churches deepen our current relationship.

Sharing in ecumenical ministry

We agree with the World Council of Churches' 2013 *The Church: Towards a Common Vision* in regard to ordered ministry,

there is no single pattern of ministry in the New Testament, though all churches would look to Scripture in seeking to follow the will of the Lord concerning how ordained ministry is to be understood, ordered and exercised. At times, the Spirit has guided the Church to adapt its ministries to contextual needs (cf. Acts 6:1-6). Various forms of ministry have been blessed with the gifts of the Spirit. Early writers, such as Ignatius of Antioch, insisted upon the threefold ministry of bishop, presbyter and deacon. This pattern of three related ministries can be seen to have roots in the New Testament; eventually it became the generally accepted pattern and is still considered normative by many churches today... Among the several means for maintaining the Church's apostolicity, such as the scriptural canon, dogma and liturgical order, ordained ministry has played an important role. Succession in ministry is meant to serve the apostolic continuity of the Church.⁽⁶⁾

Both The Episcopal Church and the Presbyterian Church (USA) reflect the threefold ordered ministries expressed by Ignatius of Antioch (bishop, presbyter and deacon), however in our polities express them differently or "locally adapted" and both denominations hold, in the broad ecumenical sense, apostolic succession.⁽⁷⁾ Both The Episcopal Church and the Presbyterian Church (USA) have recognized the gift of *episkopé*, the ministry of oversight, locally adapted, as expressed in the 2017 Churches Uniting in Christ mutual recognition or ordered ministry.

Specifically, the ecumenical dialogue between The Episcopal Church and the Presbyterian Church (USA), in round two and in this round three, recognize that diocese bishops and presbytery moderators have similar constituted ecclesial authority and expression of the gift of

episkopé as it relates to presiding at ordination, as well as installing or instituting a presbyter to a pastoral relationship.

Guided by the World Council of Churches' 1982 foundational paper, *Baptism, Eucharist, Ministry*, Chapter VI, as well as the 2013 *The Church: Towards a Common Vision* (Faith and Order Paper No. 214), presbyteries and dioceses are strongly encouraged to invite presbytery moderators and diocese bishops to participate in each other's celebrations of ministry, not only ordinations but also installations and institutions, and bishops and moderators share an ecumenical blessing. It is also strongly encouraged in their ordination of presbyters that each also includes bishops from other denominations with whom each church shares recognition of mutual ministry (i.e. Evangelical Lutheran Church in America and Northern Province and the Southern Province of the Moravian Church in America). Finally, we fervently pray that when a presbytery moderator is installed, an Episcopal bishop or their designee be present, and when an Episcopal bishop is consecrated, a Presbyterian moderator or their designee be present, and both be invited in those moments of celebration to share an ecumenical blessing.

Limited orderly exchange of ministers

Within the current agreement (2008-2009), and without exceeding the discretion of The Episcopal Church bishops and Presbyterian Church (U.S.A.) presbyteries, there shall be provision for the following exchange of ordered ministers between our churches:

- the acceptance of Episcopal presbyters (those ordained and referred to as priests) in Presbyterian placements and in ecumenical ministries where the Presbyterian Church has the right of appointment;
- the acceptance of Presbyterian Church presbyters (specifically those ordained and consecrated to the ministry of the word, sacrament, and teaching, referred to as ministers of word and sacrament or teaching elders) in Episcopal appointments such as ecumenical ministries and cooperating parishes where the Episcopal Church has the right of appointment.
- This agreement does not enable ordained Ruling Elders and Commissioned Pastors (also known as Commissioned Ruling Elder) of the Presbyterian Church (U.S.A.), nor deacons of The Episcopal Church or Presbyterian Church (U.S.A), to be considered.

THE GUIDELINES FOR LIMITED ORDERLY EXCHANGE OF MINISTERS

For missional purposes and in consultation between the diocesan bishop and local presbytery, a presbyter may be licensed (permitted) by the appropriate Ecclesiastical Authority to serve under the following guidelines.

The limited orderly exchange process begins with the identification of a ministry needed by the appropriate Ecclesiastical Authority of the inviting body and the identification of a presbyter from the sending body who may serve in that ministry setting.

The Ecclesiastical Authority of the inviting body initiates the process of the limited orderly exchange between the placement or ecumenical ministry to be served and the presbyter. The presbyter does not initiate the process of exchange.

The inviting body shall consult with the appropriate Ecclesiastical Authority of the presbyter to determine the suitability of the potential service and to receive the concurrence of the sending body. The presbyter remains accountable to the sending church for the continuation of ministerial status.

Both The Episcopal Church and the Presbyterian Church (U.S.A.) agree that experience in and knowledge of one's own tradition is seen as necessary before serving in a different tradition. Therefore, the limited orderly exchange of minister's opportunities are only open to presbyters who have been ordained for at least three years and active within the ministry of their denomination.

Presbyters serving in a limited orderly exchange position shall be temporary under this agreement. The service of presbyters should ordinarily be for a two- to four-year period, which may be renewed. Should a presbyter of one church intend to serve permanently in another church then the process of the transfer or reception of ministerial status should be followed according to the rules of the receiving Church.

Should a disciplinary process be necessary, the presbyter remains under the jurisdiction of the sending body, but the inviting body may be asked to participate as necessary.

Pension and medical coverage is through the church of ecclesiastical membership.

Functions

When a presbyter is licensed or commissioned by the appropriate Ecclesiastical Authority, the presbyter is authorized to:

- to exercise pastoral or administrative responsibility;
- lead public worship as a presbyter under the direction of diocesan bishop or presbytery;
- preach the Gospel;
- celebrate and administer the sacraments within the guidelines specified below;

- prepare persons for Baptism, Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and shall function under the direction of diocesan bishop or presbytery;
- and present the good news of Jesus Christ in such a way that people are led to receive Christ as Savior and follow Christ as Lord in the fellowship of the Church, assisting with the diocesan presbytery's ministry of evangelism partnership.

While a presbyter serves a particular placement or ecumenical setting because we do not yet have reconciliation and full interchangeability of ordained ministries, as stated in the current agreement, all authorization for these special opportunities must conform to the Book of Common Worship and the Constitution of the Presbyterian Church (U.S.A.), and the Book of Common Prayer and the Constitution and Canons of The Episcopal Church. What this means explicitly is that:

- Presbyterian presbyters will use the authorized or commended worship resources of the Presbyterian Church (U.S.A.) unless authorized by the diocesan bishop to use Episcopal worship resources (with the exception of Eucharist prayers);
- Episcopal priests will use the authorized or commended worship resources of The Episcopal Church unless authorized by the presbytery to use Presbyterian worship resources;
- Priests and presbyters are bound to the Eucharist liturgies of their respective prayer books and denominational resources when they preside;
- Both priests and presbyters may use authorized or commended worship resources of the Evangelical Lutheran Church in America, in which both churches are in full communion, including the Eucharist liturgies, with the authorization of the "inviting" Ecclesiastical Authority.

Training, Examination, and Oversight

A presbyter who serves under the terms of this Agreement on Limited Orderly Exchange of Ministers shall receive such preparation and instruction, or formation, as determined by the diocesan bishop or presbytery to be appropriate to the particular placement or ecumenical setting and length of time shall be determined by the Ecclesiastical Authority's own rule.

The presbyter shall be examined by the appropriate Ecclesiastical Authority as to personal faith, motives for seeking to serve, and the areas of instruction determined by diocesan or presbytery.

The presbyter authorized under the terms of this Agreement shall work under the supervision of the diocesan bishop or presbytery. The diocesan bishop or presbytery may at any time withdraw

this authorization for reasons it deems good and sufficient. A presbyter shall be assigned as a mentor and local supervisor.

An authorization may be for no more than four years, and no less than two. Within an appropriate time before the expiration of the commission, the presbyter shall review the covenant relationship with the diocesan bishop and presbytery. The commission may be renewed with the consent of all interested parties (i.e. diocesan bishop and presbytery, presbyter, authorized representative(s) of a particular placement or ecumenical ministry).

A presbyter who has been authorized and later ceases to serve in the specified ministry may continue to be listed as available to serve but is not authorized to perform the functions specified above until commission is renewed in order to serve in placement or ecumenical setting by the appropriate Ecclesiastical Authority.

Celebration of an Ecumenical Ministry

When the diocesan bishop or presbytery is satisfied with the qualifications of a presbyter to serve a particular placement or ecumenical ministry providing the services described above, it shall commission and institute/install the presbyter to service as designated by the diocesan bishop or presbytery while also abiding by the following:

Both diocese and presbytery will be invited to the Service.

The inviting diocesan bishop or presbytery moderator shall, at the time of such celebration, read this preface to the Service:

The Ecclesiastical Authority of this Diocese/Presbytery is satisfied that A.B. accepts the Doctrine, Discipline, and Worship of this Church and desires to serve this Church in full accord to [the Episcopal Presbyterian Agreement]. We are about to confer upon A.B. the grace and authority of Holy Orders/ordered ministry as this Church has received them and requires them for the exercise of the ministry of a presbyter.

The certificates of the commission shall contain the words:

Acknowledging the ministry which A.B. has already received and hereby adding to that commission the grace and authority of Holy Orders/ordered ministry as understood and required by this Church for the exercise of the ministry of a presbyter.

Following the rites of each church for instituting or installation, the presenters present the presbyter

saying:

In baptism, N. was clothed with Christ. N. was ordained a presbyter by Bishop N. of the Diocese of N./the Presbytery of N., and is now called by God through the voice of the church to serve as _____.

The people respond:

We remember with joy our common calling to serve Christ, and we celebrate God's call to N., to serve among us as _____.

The sending bishop or presbytery moderator asks the candidate to reaffirm their particular ordination in regard to a priest or a presbyter.

The inviting bishop or presbytery moderator addresses the presbyter, saying:

While affirming and upholding your ordination vows as a presbyter in The Episcopal Church/ Presbyterian Church (U.S.A.), while you labor in covenant relationship with the Diocese of N./Presbytery of N., will you honor the doctrine, discipline, and worship of Christ as this Church has received them? And will you, in accordance with the Constitution/canons of this Church, obey the ecclesiastical authority of the bishop and presbytery, and other ministers who may have authority over you and your work during this covenant relationship?

Answer:

I am willing and ready to do so, and I solemnly declare that I do believe the Holy Scriptures of the Old and New Testaments to be the Word of God, and to contain all things necessary to salvation; and I do solemnly engage to conform to the doctrine, discipline, and worship of the Episcopal/Presbyterian Church as required in order to be commissioned to labor as _____ under covenant agreement of our two churches.

At the appropriate time during the service of institution or installation, the presbyter kneels facing the people and is surrounded by the bishop, presbytery moderator, and all other priests and presbyters. With the bishop and presbytery moderator's hands laid on the presbyter, as well as the other priests and presbyters, one of the following⁽⁸⁾, or a similar prayer, is said aloud by the inviting bishop or presbytery moderator:

Come to our help, Lord, Holy Father, almighty and eternal God; you are the source of

every honor and dignity, of all progress and stability. You watch over the growing family of humanity by your gift of wisdom and your pattern of order. When you had appointed high priests from among the people of Israel to lead your people, you also chose others to serve with them and to help them in their task; and so there grew up the ranks of presbyters and the offices of Levites, established by sacred rites.

In the desert, you extended the spirit of Moses to seventy wise men who helped him to rule the great company of his people. You shared among the sons of Aaron the fullness of their father's power, to provide worthy priests in sufficient number for the increasing rites and worship, and elders to care for the spiritual and temporal welfare of God's people. With the same loving care you gave companions to your Son's apostles to help in teaching the faith: they preached the gospel to the whole world. Lord, grant also to us such fellow workers, for we are weak and our need is greater. Provide for us presbyters who will provide for the worship and care of your people as we seek to be the body of Christ in the world.

Almighty Father, strengthen by your Holy Spirit this servant of yours the dignity of your eternal priesthood in Christ, as a servant of servants. Renew within him/her/them the Spirit of holiness. As a co-worker with bishops, pastors and fellow presbyters may he/she/they be faithful to the ministry that he/she/they receives from you, Lord God, and be to others a model of right conduct. May he/she/they be faithful in working with your people, as well as ordered deacons, fellow presbyters and pastors, so that the words of the Gospel may reach the ends of the earth, and the family of nations, made one in Christ, may become God's one, holy people. We ask this through our Lord Jesus Christ, your Son, who lives and reigns with you and the Holy Spirit, one God, for ever and ever. Amen.

OR

O God, the source of all holiness, whose grace is ever effective, whose blessing is ever fulfilled, pour out on these servants of yours the gift of your blessed Holy Spirit. By their noble and exemplary lives let them prove that they are elders of the people, true to the Gospel of Christ our Lord and to the norms for presbyters as laid down by Paul to Timothy and Titus. Let them meditate on your law day and night, so that they may believe what they have read, teach what they have believed, and practice what they have taught. May justice, constancy, mercy, courage, and all the other virtues be reflected in their every way of life. May they inspire others by their example, and hearten them by their admonitions. May they keep pure and spotless the gift of their calling. For the worship of your people may they celebrate the mystery of Holy Communion and living a sacramental life in

community. May they through persevering charity mature in the unity of the faith and of the knowledge of the Son of God, reflecting Christ clearly, and rise on the day of the Resurrection with a good conscience, true faith, and the full gifts of the Holy Spirit. We ask this through our Lord Jesus Christ, your Son, who lives and reigns with you, in the unity of the Holy Spirit, God, forever and ever. Amen.

Followed by a declaration similar to

N., you are instituted/installed to service in this church as _____ in the name of the Father, of the Son, and of the Holy Spirit.

Whatever you do, in word or deed, do everything in the name of the Lord Jesus, giving thanks to God through him.

Following the service of institution or installation, the Eucharistic celebrant shall be the bishop in Episcopal settings, and ordinarily the authorized presbyter in PC (U.S.A.) settings.

An appendix with terms relating to both the Episcopal Church and the Presbyterian Church (USA) can be found at [https://www.dropbox.com/s/5r1fggoqzyhoiqo/local sharing of min with glossaries TEC PCUSA Dialogue Jan 2021.docx?dl=0](https://www.dropbox.com/s/5r1fggoqzyhoiqo/local%20sharing%20of%20min%20with%20glossaries%20TEC%20PCUSA%20Dialogue%20Jan%202021.docx?dl=0)

End Notes

- (1) The Episcopal Church and the Presbyterian Church (U.S.A.) have been in ecumenical dialogue since the 19th century.
- (2) Adapted from *For the Sake of the Gospel: Mutual Recognition of Ordained Ministries in the Anglican and Uniting Churches in Australia*, 2001.
- (3) *The Nature and Purpose of the Church*, Faith and Order Paper No. 181 (Geneva: WCC, 1998), §9.
- (4) See *The Book of Common Prayer* p. 855: “The mission of the Church is to restore all people to unity with God and each other in Christ.”
- (5) See *Together Towards Life: Mission and Evangelism in Changing Landscapes*. Edited by Jooseop Keum (Geneva: WCC, 2013).
- (6) *The Church: Towards a Common Vision* (Faith and Order Paper No. 214) (Geneva: WCC, 2013), 26. Cf. Ignatius of Antioch’s Letter to the Magnesians 6 and 13; Letter to the Trallians 7; Letter to the Philadelphians 4; Letter to the Smyrnaeans 8.
- (7) See *The Book of Order of the Presbyterian Church in the United States of America* (Philadelphia: PCUSA, 1789), “bishop” and “pastor” are interchangeable, and it is the pastor, as moderator of

the session, that oversees as a member of the presbytery and presides at the ordination of elders and deacons. Cf “The Successor to Peter: A Paper for Discussion from the Presbyterian Church (U.S.A.)”, Unilateral Discussion PC(USA) and Vatican. Louisville, Kentucky, December 6-7, 2000. Endnote 5, “It may be of some interest that prior to the 1983 reunion of the northern and southern branches of Presbyterianism, the Book of Order of the northern branch, the United Presbyterian Church in the U.S.A., offered several titles for ministers of Word and Sacrament, among them the title ‘bishop.’ If one looks, say, at the roll calls in the minutes of the Presbytery of Philadelphia around the middle of the nineteenth century one will read ‘The following bishops were in attendance’ The concept was that every installed pastor of a congregation is bishop of a congregationally constituted diocese. He or she is surrounded by presbyters or ‘elders’ and assisted by ‘deacons.’” Here, on a small scale, as a parochial diocese, Presbyterians have the historic threefold ministry expressed by Ignatius.

(8) Prayers adapted from Catholic Church, International Committee on English in the Liturgy, *Ceremonial of Bishops: Revised by Decree of the Second Vatican Ecumenical Council and Published by Authority of Pope John Paul II (Revised), “Rite of Ordination of Presbyter”*. Liturgical Press, 1989.

UNITED METHODIST EPISCOPAL COMMITTEE

Membership

Dr. Deirdre Good, <i>Chair</i>	Maine, I	2021
The Rev. Dr. Karen Coleman	Massachusetts, I	2021
The Rev. Dr. Thomas Ferguson	Massachusetts, I	2021
The Rev. Mariclaire Partee Carlsen	Pennsylvania, III	2021
The Rt. Rev. David Rice	San Joaquin, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

From Resolution A055 from the 2006 General Convention:

The Episcopal Church and The United Methodist Church recognize one another as a member of the one, holy, Catholic and apostolic Church in which the Gospel is rightly preached and taught, and encourage the development of common Christian life throughout our respective Churches. Both churches agree that the basic teaching of each respective Church is consonant with the Gospel and is sufficiently compatible that a relationship of Interim Sharing of the Eucharist was established in 2006 under guidelines issued by the General Convention. The dialogue has been commissioned to continue United Methodist-Episcopal Dialogues for the discussion of any other outstanding questions that must be resolved before full communion can be established between the respective Churches. Resolution A041 from the 2018 General Convention received the “A Gift for the World,” the proposal for full communion, for consideration, discussion, and study, and authorized the continued work of The Episcopal Church-United Methodist Church dialogue.

Summary of Work

This dialogue met three times during the triennium in-person and several times online through Zoom. There have been two main goals of the dialogue.

1) “A Gift to the World,” a proposal for full communion, was finalized and submitted to both communions for consideration at the 2022 General Convention and the 2020 United Methodist General Conference. This agreement proposes a sharing in the historic episcopate between The United Methodist Church and The Episcopal Church and full interchangeability of the ministries of deacons, priests/elders, and bishops. A copy of the proposal may be found online at <http://www.umc-tec.org/>.

2) The dialogue team also looked closely at practical areas of cooperation and collaboration in mission and ministry. One meeting was held at Boston University School of Theology, a Methodist seminary with an Anglican Studies program. A series of local, regional gatherings were being developed when the Covid-19 epidemic emerged. Some provincial webinars have been held to discuss this dialogue, the proposal for full communion, and possible local and regional collaboration. The dialogue team continues to work with networks in both churches to find ways to foster cooperation and collaboration in ministry.

The dialogue team also needed to take into account profound changes taking place in The United Methodist Church. At a 2019 Special General Conference, The United Methodist Church reaffirmed its prohibition on the service of openly LGBT persons as clergy and its prohibition of the blessing of same sex marriages. In the following months, a proposal was drafted and submitted to allow for a formal separation of The United Methodist Church. A vote on this proposal, which includes rescinding the prohibition on same sex marriage and the service of openly LGBT persons, was to have been held at the scheduled 2020 General Conference of The United Methodist Church. This General Conference, however, was postponed until August of 2021.

At its August 2020 meeting the dialogue team made the recommendation that “A Gift for the World,” the proposal for full communion, not be considered at the 2022 General Convention of The Episcopal Church and 2021 General Conference of The United Methodist Church. From the perspective of the Episcopal Church members of the dialogue, it was felt that the legislative processes in The United Methodist Church needed to run their course before considering the proposal. The United Methodist Church members of the dialogue were also in full agreement and will be taking similar steps.

EXECUTIVE COUNCIL REPORTS

Report on Resolutions Referred to Dioceses

REPORT ON RESOLUTIONS REFERRED TO DIOCESES

Sixty-One (61) dioceses responded to resolutions referred for action or consideration after the 79th General Convention, as recorded below:

Resolutions Referred for Action or Consideration		ACTION COMPLETED	ACTION ONGOING	NO ACTION
A072	Provincial Geographic Boundaries	17	13	29
A144	Diocesan Missional Review	15	30	14
A221	Collaboration and Networking	10	35	14
A223	Family Leave Policies	16	22	21
A225	On the Importance of Ecumenism for Becoming Beloved Community	12	35	12
A238	Admit Episcopal Diocese of Cuba as a Diocese of The Episcopal Church	22	12	25
B006	Amend Canon 1.17	24	20	15
B009	Civil Discourse	12	29	18
B025	Water as a Human Right	9	29	21
B027	Gender Inclusivity in Climate Change Action	8	25	26
C022	Supporting Transgender Access	12	30	17
C037	Call to Respond to Opioid Epidemic	12	28	19
C041	Repair America's Safety Net	9	33	17
C049	Support Producers of Locally Grown Food	11	29	19
C063	Advocate for Ocean Health	8	15	36
D047	Compassionate Care of Victims of Sexual Abuse by Clergy	18	27	14
D050	Solidarity with Victims of Religious Persecution	9	24	26
D053	Stewardship of Creation with Church-Owned Land	9	28	22

REPORTS TO THE 80th GENERAL CONVENTION

Resolutions Referred for Consideration or Information		CONSIDERED COMPLETED	CONSIDERATION ONGOING	NOT CONSIDERED
A010	The Planting of “Paris Groves”	15	14	32
A018	Episcopalians Participating in Paris Climate Agreement	13	23	25
A029	Commend the Evangelism Charter for the Church to All Episcopalians	14	28	19
A035	Commend “The Church Towards a Common Vision”	11	14	36
A039	Affirm the Work of The Episcopal Church at the United Nations	11	17	33
A058	Encourage Use of Asset Map	24	27	10
A065	Authorize Lesser Feasts and Fasts 2018	30	15	16
A081	An Episcopal Theology of Evangelism	19	22	20
A115	Adopt and Implement the Charter for Safety	23	20	18
A145	Urging Adoption of Local Canons Relating to Episcopal Elections	21	18	22
A178	Halt the Intensification and Implementation of Immigration Policies and Practices that are Harmful to Migrant Women, Parents and Children	18	26	17
A207	Encouraging Mission as Part of the Beloved Community	22	27	12
A215	Solidarity with the People of Venezuela	8	15	38
A222	Against Caste-Descent- Based Discrimination	8	19	34
A282	Amend Canon III.11.3(b)	32	13	16
B002	Anti-Corruption	10	20	31
B008	Stewardship in Communities of Color	11	22	27
B012	Marriage Rites for the Whole Church	28	23	10
B022	Support for The Episcopal Church in the Philippines and Joint Efforts to Continue the Jesus Movement Scholarship Program	11	8	41
B024	Police Killings and Mental Illness	15	29	16
B028	Continue Commitment to Growing Financial Generosity Within the Church	19	29	12

REPORTS TO THE 80th GENERAL CONVENTION

Resolutions Referred for Consideration or Information		CONSIDERED COMPLETED	CONSIDERATION ONGOING	NOT CONSIDERED
B031	Commend Global Episcopal Mission Network	14	19	27
Bo04	Encouraging the Language of Dismantling Racism and Racial Healing, Justice and Reconciliation	25	25	10
C008	Advocacy for Creation Care	18	24	18
C009	Becoming A Sanctuary Church	18	25	17
C020	Carbon Tax	12	18	30
C032	Against Human Trafficking	17	22	21
C054	Inclusion of Transgender People	17	27	16
C064	Support of the Leech Lake Band of Ojibwe In Opposing Enbridge Line #3	19	14	28
C078	Authorize Holy Eucharist, Rite II (Expansive Language) for Trial Use	25	18	17
D006	Just Transition: Automation and New Technology	11	24	25
D007	Disaster Resilience Policy	22	25	13
D009	Christian Principles for Responding to Human Migration	18	27	15
D014	Addressing Maternal Mortality	17	20	24
D024	Support for The Episcopal Church of South Sudan and Sudan and Their Efforts to Foster Peace	12	23	26
D031	Recognizing and Ending Domestic Violence in our Congregations	9	32	20
D043	Welcoming the Church of South India	16	11	34
D046	Expansive-Language Liturgical Resources	18	28	15
D054	Expand YASC and EVIM Support	12	27	22
D061	Develop Episcopal Gap Year Program	9	16	36
D067	Bias-Free and Expansive Language for God and Humanity	12	31	18
D074	Amend Canon IV.6.4	37	9	14
D077	Reduce Death Penalty Sentence	12	20	29
D093	Representative Planning Teams	22	24	15
D096	Support for Good Governance	19	25	17

HOUSE OF BISHOPS REPORTS

House of Bishops Committee on Pastoral Development

House of Bishops Committee on Theology

Presiding Bishop's Council of Advice

HOUSE OF BISHOPS COMMITTEE ON PASTORAL DEVELOPMENT

Membership

The Rt. Rev. Gayle Harris, <i>Chair</i>	Massachusetts, I	2021
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2021
The Rt. Rev. Oge Beauvoir	Haiti, II	2021
The Rt. Rev. Clifton Daniel	New York, II	2021
The Rt. Rev. Susan Goff	Virginia, III	2021
The Rt. Rev. Herman Hollerith	Southern Virginia, III	2021
The Rt. Rev. Todd Ousley	Eastern Michigan, V	2021
The Rt. Rev. Jake Owensby	Western Louisiana, VII	2021
The Rt. Rev. Lawrence Provenzano	Long Island, II	2021
The Rt. Rev. Dean Wolfe	New York, II	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	

Representation at General Convention

The Rt. Rev. Gayle Harris

Mandate

THE COMMITTEE ON PASTORAL DEVELOPMENT OF THE HOUSE OF BISHOPS & THE OFFICE OF PASTORAL DEVELOPMENT: REPORT TO THE 1979 GENERAL CONVENTION

The Committee on Pastoral Development is a Standing Committee of the House of Bishops. It was created in 1959 when the Presiding Bishop, Arthur Lichtenberger, appointed a committee to study the pastoral needs of the clergy and their families.

Summary of Work

Our current focus: To build “shalom” in The Episcopal Church through its attention to the life and work of bishops and their families.

To that end, the Committee:

- Attends to the corporate wellness of the House of Bishops, assessing needs and providing for programmatic responses where appropriate and needed;
- Assists with the wellness of individual bishops; building systems that allow for pastoral care and healthy relationships, and providing opportunities for education and training in order to exercise gracious leadership to better serve and enable the community of the baptized in their mission; and
- Serves as a primary source of advice and support to the Bishop for and the Office of Pastoral Development.

Meetings: The Committee met in person twice in the years 2018 and 2019, and three times via teleconference during the triennium, and at other regularly scheduled meetings of the House of Bishops.

The following were ongoing matters of concern for the Committee during the triennium:

1. At each gathering of the House of Bishops, the committee promotes and presents the Core Values and Social Media Policy of the house, in order to continue to develop a learning, discerning, and healing community within the House of Bishops;
2. Serves as a council of advice and support to the Bishop for the Office of Pastoral Development and for the Presiding Bishop, especially regarding the re-formation of Dioceses following termination of relationships with The Episcopal Church and separation of House of Bishops members seeking new jurisdiction;
3. Works with the House of Bishops Planning Committee in the continuity of programs between House of Bishops meetings;
4. Supports collaboration and collegiality between the Spouses and Partners of Bishops Network of The Episcopal Church and the House of Bishops;
5. Provides direct pastoral care to bishops and their spouses/partners;
6. Continuing research and reports to House of Bishops regarding appropriate use of Social Media within the House;

7. Continuing discussion of Title IV concerns and issues;
8. Raising awareness regarding the ministries, care, and support of Bishops Suffragan;
9. Works to develop gracious norms for a newly elected bishop when that bishop's spouse is ordained and is currently serving, or wishes to serve, within that diocese;
10. Monitors issues concerning income replacement and disability for bishops;
11. Continuing discussion, the raising of awareness and recommendations to the House of Bishops concerning #MeToo matters;
12. Addressing hospitality and procedures for visiting bishops at House of Bishops gatherings;
13. Review of the leave-taking ritual of retiring bishops;
14. Provided suggestions and support for the development and adoption of the Covenant to Dismantle Racism with the HOB;
15. Revised the HOB Core Values to strengthen the Covenant to Dismantle Racism, and hold each bishop accountable in our fellowship and ministry;
16. In conjunction with the HOB Planning Committee and the College for Bishops, developed follow up to the covenant, and incorporation of anti-racism work at the 2021 Spring HOB gathering.

Budget

The Committee expects to meet a similar number of times in the next triennium. This will require a budget of \$14,000 per year for a total of \$42,000.

Proposed resolutions

A084 HOB Pastoral Development Expenses

Resolved, the House of _____ concurring, That there be appropriated from the budget of the General Convention the sum of \$42,000 for the expenses of the House of Bishops Committee on Pastoral Development for the 2021-2024 Triennium.

EXPLANATION

The budget request is to cover expenses for 3 in person and electronic meetings for the 2021-2024 Triennium. This will require a budget of \$14,000 per year for a total of \$42,000.

HOUSE OF BISHOPS COMMITTEE ON THEOLOGY

Membership

The Rt. Rev. Allen Shin, <i>Chair</i>	New York, II	2021
The Rt. Rev. Laura Ahrens	Connecticut, I	2021
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2025
The Rt. Rev. Larry Benfield	Arkansas, VII	2021
The Very Rev. Dr. Kelly Brown Douglas	New York, II	2021
Dr. Stephen Fowl	Maryland, III	2021
The Rt. Rev. R. William Franklin	Western New York, II	2023
The Rt. Rev. Carol Gallagher	Massachusetts, I	2026
The Rev. Dr. Altagracia Perez-Bullard	New York, II	2023
The Rt. Rev. Gretchen Rehberg	Spokane, VIII	2026
The Rt. Rev. Prince Singh	Rochester, II	2021
The Rev. Katherine Sonderegger	Virginia, III	2023
The Very Rev. Dr. James Turrell	Bethlehem, III	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	

Changes in Membership

Dr. Beverly Mitchell, resigned 2019

Acknowledgements

Ann Sabo, *Administrator*

Mandate

The House of Bishops Theology Commission is appointed by the Presiding Bishop and serves as a resource to the bishops as they pursue their teaching ministry in the church.

Summary of Work

The House of Bishops Theology Commission is appointed by the Presiding Bishop and serves as a resource to the bishops as they pursue their teaching ministry in the church. At present, the committee comprises eight (8) bishops and five (5) academic theologians. With the Rt. Rev. Thomas Breidenthal as chair, the committee held an organizational meeting in May of 2017 in Cincinnati in the previous triennial period. We agreed to work on developing a theological document undergirding the Presiding Bishop's call of the Church toward becoming Beloved Community. We divided into three (3) subgroups, focused on three (3) areas relating to racism and racial reconciliation: (1) historic documents; (2) narratives that shape us; and (3) scriptural, patristic and liturgical resources.

We met again in January of 2018 in New York to receive the first update on the work of the subgroups. At this meeting, we also realized that in order to continue the work at hand in a meaningful way, we needed to first deal with the issue of white supremacy. When we met in May of 2018 in Chicago, we finalized the document we had been working on, entitled Draft Resources for Becoming Beloved Community. This was reported to the Presiding Bishop and disseminated to the bishops in August of 2018.

When we met again in January of 2019 in Chicago, we began tackling the issue of white supremacy and developed an initial report regarding this to the House for its gathering in March, 2019. At our meeting in May of 2019 in Chicago, we received the subgroups' further work on the issue of white supremacy as it relates to our work on Beloved Community.

In January of 2020 in Chicago, we drafted a document to be reported to the House. We also decided on the next phase of our work, which, we agreed, needed to be on the issue of reparations. Our report on white supremacy to the House of Bishops in March had to be postponed due to the pandemic. We met online in June to finalize the document on white supremacy. The final version of this document, entitled White Supremacy, Beloved Community and Learning to Listen, was shared with the bishops in early August and was taken up as the main theme of the online meeting of the House in September, 2020. At the end of November, the Rt. Rev. Thomas Breidenthal resigned as Bishop of the Diocese of Southern Ohio and from the chair of this committee. On Bishop Breidenthal's recommendation, the Presiding Bishop subsequently appointed me as the chair of this committee.

We plan to meet online in January of 2021 to continue the work on the issue of reparations as relating to Beloved Community. We hope to complete this work ahead of General Convention in 2022.

Submitted by The Rt. Rev. Allen K. Shin, Chair

PRESIDING BISHOP'S COUNCIL OF ADVICE

Membership

The Most Rev. Michael Curry, <i>Chair</i>	North Carolina, IV	2021
The Rt. Rev. Larry Benfield	Arkansas, VII	2021
The Rt. Rev. Ian Douglas	Connecticut, I	2021
The Rt. Rev. Dr. DeDe Duncan-Probe	Central New York, II	2021
The Rt. Rev. Mark Hollingsworth	Ohio, V	2021
The Rt. Rev. William Klusmeyer	West Virginia, III	2021
The Rt. Rev. Kimberly Lucas	Colorado, VI	2021
The Rt. Rev. Rafael Morales	Puerto Rico, IX	2021
The Rt. Rev. Gretchen Rehberg	Spokane, VIII	2024
The Rt. Rev. Robert Wright	Atlanta, IV	2021
The Rt. Rev. Diane M. Jardine Bruce, <i>Ex Officio</i>	Los Angeles, VIII	
The Rt. Rev. Mary Gray-Reeves, <i>Ex Officio</i>	North Carolina, IV	
The Rt. Rev. Todd Ousley, <i>Ex Officio</i>	Eastern Michigan, V	

Changes in Membership

Bishop Benhase of Province IV left in 2020 and was replaced by Bishop Wright of Atlanta.
 Bishop Prior of Province VI left in 2020 and was replaced by Bishop Lucas of Colorado.
 Bishop Konieczny of Province VII left in 2020 and was replaced by Bishop Benfield of Arkansas.
 Bishop Scantlebury of Province IX left in 2020 and was replaced by Bishop Morales of Puerto Rico.

Mandate

Rules of Order: House of Bishops XXVII

There shall be an Advisory Committee, composed of Bishops who are the Presidents or Vice-Presidents of each Province, which will act as advisory council to the Presiding Bishop between meetings of the House of Bishops. The Committee shall elect its own officers.

Summary of Work

The Council usually meets as part of each House of Bishops Meeting and one additional time each year, however in 2020 the Council met virtually on the following dates: March 4, March 27, July 8, and December 9

HOUSE OF DEPUTIES REPORTS

House of Deputies Committee on the State of the Church

President of the House of Deputies Council of Advice

HOUSE OF DEPUTIES COMMITTEE ON THE STATE OF THE CHURCH

Membership

The Rev. Chris Rankin-Williams, <i>Chair</i>	California, VIII	2021
Ms. Louisa McKellaston, <i>Vice-Chair</i>	Chicago, V	2021
The Rev. Paul Canady, <i>Secretary</i>	East Carolina, IV	2021
Mr. Keane Akao	Hawaii, VIII	2021
Ms. Lindsey Ardrey	Louisiana, IV	2021
The Rev. LaClaire Atkins	Nebraska, VI	2021
The Rev. Carlos de la Torre	Central Pennsylvania, III	2021
The Rev. Canon Dale Grandfield	Bethlehem, III	2021
The Rev. Ramelle McCall	Maryland, III	2021
The Rev. Leigh Preston	East Tennessee, IV	2021
The Rt. Rev. Sean Rowe	Northwestern Pennsylvania, III	2021
The Rev. Nelson Serrano Poveda	San Joaquin, VIII	2021
Mr. Jason Sierra	Texas, VII	2021
Mr. James Simon	Ohio, V	2021
Ms. Allison Thompson	Lexington, IV	2021
The Rev. Kate Wesch	Connecticut, I	2021
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

LaClaire Atkins was appointed in January 2019. Erendira Jimenez served on the committee until February 2019.

Acknowledgements

First and foremost, we are grateful for the work of Rebecca Wilson, official representative of President Jennings on this committee, who was integral to our work and served as an essential, though non-voting member for the triennium. Many thanks to Presiding Bishop Curry and the House of Bishops for their time during our meeting in September, 2019. We wish to thank the Rev. Edwin Johnson for meeting with the survey sub-committee and providing valuable insight. Matthew Price,

from the Church Pension Group, and Ken Howard from faithX were instrumental in providing helpful information for the parochial report revision. We're grateful to the Executive Council for their part in working with us on the parochial report. We also appreciate the work the General Convention Office staff has done for us this triennium. Thank you to The Episcopal Church Archives for compiling the report contained in the appendix of this report. Finally, thank you to all who offered feedback to the parochial report in particular and to those who responded to our survey.

Mandate

CANON I.6.5.b A Committee of the House of Deputies shall be appointed following the close of each General Convention, to serve *ad interim*, and to prepare and present to the next meeting of the House of Deputies a report on the State of the Church; which report, when agreed to by the said House, shall be sent to the House of Bishops.

Summary of Work

Introduction and Mandate

In September 2018, House of Deputies President Gay Clark Jennings appointed 19 people, all members of the Millennial and GenX generational cohorts, to the House of Deputies State of the Church Committee for the 2018-2021 triennium. In her charge to the committee, she wrote:

"This triennium, I am asking the House of Deputies State of the Church Committee to do a new thing—to be an energetic think tank and incubator for adaptive thinking, innovative ideas, and fresh approaches to the church's leadership, organizational thinking, and common life. Rather than issuing a charge to explore specific issues, I am instead asking the committee to identify, study and report on the Episcopal Church's most significant opportunities to innovate and experiment so that we are equipped for 21st century mission and ministry in our congregations, communities, and countries.

Part of your work will be to fulfill Resolution 2018-A053, which directs the design of a new parochial report 'relevant to the diversity of the Episcopal Church's participation in God's mission in the world.' The rest of your time will be spent exploring how we can find new ways to foster the participation of all Episcopalians in that mission. As a mark of my commitment to fostering innovation, exploration

and fresh leadership, I have appointed no Baby Boomers to this committee; it may be the first churchwide body since the 1960s to carry that distinction!"

The committee, which soon dubbed itself Hot Sauce (a creative pronunciation of HoD SOTC), met first at the Maritime Center in Linthicum Heights, Maryland from November 11-14, 2018, alongside many other interim bodies. At that meeting, we spent significant time identifying themes and priorities for our work together. Both President Jennings and Presiding Bishop Michael Curry also spent time with us reviewing our initial work and sharing their perspectives.

Over the course of our monthly online meetings in the first half of 2019, we worked to consolidate our initial list of twenty questions to prompt adaptive change experiments in the church into four key inquiries:

- Can the Episcopal Church be less hierarchical and instead be more like God's kingdom?
- What does it mean to belong/be a member of an Episcopal Church?
- How do we actively dismantle systems of power in the church that belittle, marginalize, oppress, and limit our imagination?
- What is the vision, need and call for Christian leadership in the world?

To explore these questions, we decided to seek data from both the House of Deputies and House of Bishops.

Meetings

We were very grateful to Presiding Bishop Curry for inviting us to meet with the House of Bishops at its meeting in Minneapolis from September 18-21, 2019. We are not aware of any other State of the Church Committee that has been invited to meet with the House of Bishops, just as we believe that we are the only State of the Church Committee in Episcopal Church history to include a bishop: Bishop Sean Rowe.

During our time in Minneapolis, we held our second in-person meeting at a hotel near the House of Bishops meeting site, and on the morning of September 19, we met for two hours with the members of the House. The data we gathered during that meeting is included in this report.

We continued meeting monthly after returning from our meeting in Minneapolis with the hope of launching a survey for deputies and alternate deputies early in 2020. Although that work was delayed

by several months due to the COVID-19 pandemic, we did conduct the survey in November and December of 2020; our methodology and results are detailed below.

During the pandemic, our monthly Zoom meetings and sub-committee meetings became a source of sustenance for many of us whose lives, studies, and jobs were upended by COVID-19 and the epidemic of racial injustice. As we worked and cared for one another, we sought to embody the kind of community that we long for the church to be.

Due to the pandemic, our in-person meeting scheduled for September 16-18, 2020, was moved to Zoom, and during that meeting, we finalized both the House of Deputies survey described below and the 2020 revision of the parochial report, also described below.

We continue to meet monthly via Zoom. While this report to the General Convention covers only our work through March 1, 2021, President Jennings has charged us to continue our work through the 80th General Convention in July, 2022.

We plan to continue fulfilling President Jennings's mandate to us and to continue assessing the ways in which the COVID-19 pandemic has impacted and will continue to impact the Episcopal Church, and we hope to provide the General Convention with a supplemental report on our work from March 2, 2021-June 1, 2022. In particular, we expect that our Membership Subcommittee, which was unable to complete its work by March 2021 due to COVID-related issues, will present a report and related resolution(s) to the General Convention.

Challenges

At our initial meeting, we committed to conducting our work in the spirit of adaptive change, recognizing that we do not currently have the tools, or even the ability to define, the challenges that the church faces. In our effort to work adaptively, we identified several challenges that the church must address in order to make future adaptive change work possible:

Research capacity: The Episcopal Church currently has no meaningful capacity to collect and analyze data in a coordinated way. We faced these limitations both in attempting to analyze the qualitative data we collected at the House of Bishops meeting we attended and in creating a survey for the House of Deputies and analyzing data from it. While we were working, we also observed other interim bodies struggling to conduct research, and the effect of too many overlapping surveys being put in the field by disparate committees with no way to coordinate. As a result, we are proposing a resolution asking the General Convention to create appropriate research and data analysis capacity

at the churchwide level and to ensure that it is available to interim bodies charged to carry out the resolutions of General Convention.

Collaborative tools: Early on, we committed to working collaboratively and forming a community of practice that would embody the kind of church we envision. When the COVID-19 pandemic began, our need both to collaborate online and stay connected with one another increased. Unfortunately, the primary tool available for interim body work--the Extranet--is woefully inadequate. We employed a variety of workarounds--Google (Drive, Docs and Sheets), Facebook, and email, but it is clear that to have any hope of facilitating collaborative work that can bring about meaningful change in the church, we must allocate money for state-of-the-art collaborative tools customized or developed by experts in the field. We are proposing a resolution to ensure the development of these tools is a priority in time between the 2022 and 2024 General Conventions.

Mindset: We are exceptionally grateful to President Jennings for charging us to “be an energetic think tank and incubator for adaptive thinking, innovative ideas, and fresh approaches to the church’s leadership, organizational thinking, and common life.” During the course of our work, we have learned how difficult it is to switch in and out of an adaptive mindset, and how truly challenging it is to imagine large-scale culture change in the church. We will continue to wrestle with this work until General Convention 2022; we urge the presiding officers and the General Convention to identify a group of people committed to adaptive change principles to work over a sustained period of time, with adequate resources for outside consultation, data gathering and analysis, and evaluation, outside the constraints and timelines of the usual interim body processes and restrictions.

Data from the House of Bishops

Following a presentation to the House of Bishops about our mandate, our vision for the church and what we hoped to accomplish during the triennium, each State of the Church Committee member joined one of the House of Bishops’ table groups. Our goal was to have informal conversations about the church and to hear directly from bishops about their hopes for the church, their challenges in ministry, successes in their dioceses and their visions for the future.

Members of the SOTC Committee used a common list of questions to guide discussion with bishops at their table. The list was ambitious, but many tables were able to answer them all:

- What is your dream for the Episcopal church?
- What traditions, policies, and practices, etc. stand in the way of making this dream a reality?
What part of being a bishop do you like most?

- What would you give up if you could?
- Outside of canonical definitions, what does it mean to be a member of a parish or worshipping community?
- How do you measure engagement and membership?
- How do you share authority with clergy and laypeople in your diocese?
- What about that system works? What doesn't work?
- In what ways have the structures and norms of the church kept you from addressing racism and other forms of discrimination?
- Are there times when you have experienced discrimination as bishop?
- Where do you see creative and faithful ministries in your diocese? Describe the most innovative ministry in your diocese and how it is supported.

The responses were diverse, depending largely on geographic location, tenure of bishop, and financial resources, which are also the factors that often determine the nature of the challenges faced by each bishop. At least one bishop in each group reported that congregational visits are their favorite part of the job, and generally there is a common desire to work together to move the church through the 21st century with love and care.

In overwhelming numbers, bishops enjoy spending time with the people of their dioceses and find cases adjudicated through the Title IV disciplinary process to be burdensome. Institutional inertia, protocols and procedures are cited as huge barriers to ministry by many bishops, and that institutional constraints can take time away from ministering directly with people and communities and inhibit creativity in work and ministry. When asked how they share authority with clergy and lay people in their dioceses, many indicated that they strive for involvement and parity with their clergy and lay members, and more than a few indicated that they do not share their authority.

Bishops' dreams for the church are not dissimilar to those of many laypeople and clergy. There is a common desire for adaptation that includes moving beyond being tied to buildings and operations. While buildings can be an essential tool for ministry, the church too finds itself weighed down by the cost of building maintenance. Finding a way to move beyond the constraints of our buildings, while a complex task, will likely prove even more essential in the future.

Overall, bishops cite working together to be a new community, representing God's Dream and living into the Beloved Community, as the vision they believe will be most unifying for the church. They hope that the church will increase its commitment to be a movement of disciples.

Bishops find that their role as teachers is often pushed to the back burner due to their time-consuming institutional responsibilities. Several bishops long for the opportunity to do more teaching at every level than is currently possible. Although the job of bishops has come to mean many things and varies widely by diocese, many bishops express a desire to return to their primary vocational functions of preaching, teaching and leading rather than carrying out executive and administrative roles such as CEO, operations director, manager, etc., for which many bishops find themselves unprepared. Bishops recognize that their job must entail some of these executive and administrative duties, but they believe that it need not be the primary focus of the episcopate.

Bishops have a myriad of responses to questions about their personal experiences of discrimination and their efforts to address it on an institutional level. Bishops who are white recognize their discomfort with acknowledging the privilege of being white. The fact that the Episcopal Church has only recently, as an institution, come to terms with the need to address the sin of racism in the church, have made it difficult to address racism and discrimination as a long-term priority, rather than a one-off class or study. Bishops who identify as female reported not always being included the same way their male identifying counterparts are in their local contexts.

In addition to gaining a clear sense of the challenges that bishops encounter and their perspective on the issues we had identified as our focus, committee members had the opportunity to talk informally with bishops and bridge gaps that sometimes exist between young leaders and senior ones. In our presentation, we challenged the bishops to ensure that no member of the SOTC Committee had to pay for their own lunch that day, and in that, we were completely successful: all members of the committee were invited to lunch by a bishop at the session's close.

Data from the Councils of Advice for Ethnic Ministries

In January 2020, SOTC member Leigh Preston was able to lead a discussion at the Councils of Advice for Ethnic Ministries using the same questions we asked in small group discussions at the House of Bishops. We are grateful to Leigh and to the Councils of Advice for Ethnic Ministries for participating in this discussion. A summary of their responses is included here:

When asked about their dream for the Episcopal Church, council members expressed the desire for more opportunities for learning and training, noting that while worship is extremely important, we also need to focus on building capacity in other areas of ministry. Council members identified the need for culturally significant practices for indigenous and other ethnic communities to be honored and embraced by the church. Like many members of the House of Bishops, council members urged a

focus on being disciples, rather than caring for buildings. They said, “We must go beyond preservation.”

Barriers to these dreams and hopes for the church’s future include the allocation of resources and funds and church finances. Council members urged the church to examine if our policies are in line with what people want and need, and cited too much bureaucracy, a fear of evangelism, and lack of diverse theology as problems to be addressed.

When asked about how to define church vitality, and how to assess the strength and viability of a congregation, council members emphasized diversity and the importance of raising up new leaders and equipping them for ministry. They commended to congregations several questions: How many ministries are offered? Is the building or space used by the community? If the church were gone, would it be missed? Many council members emphasized the need for congregations to acknowledge that churches don’t exist for their members, but for their communities.

When asked about their experiences of discrimination in the church, council members frequently cited tokenism—being asked to be the one person who fulfills the diversity requirement in a group. Too often, groups or congregations say that they value diversity but are not willing to do the work to become truly diverse. In particular, the process of discerning a call to ordained ministry is not always open or available, in practical terms, to minorities; it often privileges those who are able to take a break from work or family life. Women and people of color still make less than their white male counterparts. Members of the councils hope that the church will undertake serious, ongoing study of these issues, and that changes to our system or canons will result in pay equity across the board.

Council members cited innovative ministry taking place where youth ministry is funded and promoted, where people of color have a voice on bishops’ or diocesan staffs, and where the culture of different ethnicities are being shared with the entire church. The council expressed the desire to have a more collaborative space to set and share goals.

Data from the House of Deputies: Survey Subcommittee

In 2020, we formed a subcommittee to develop a survey for lay and clergy deputies. The goal of the survey was to gain anonymous feedback on General Convention, particularly the accessibility and efficiency of the day-to-day business of convention while in session, as well as to explore general challenges and opportunities facing the church. The survey was sent electronically to deputies and alternate deputies to the 79th and 80th General Conventions. We aimed to have as wide a reach as possible, while making sure those surveyed would be able to answer from experience the questions being asked.

The survey, issued in both English and Spanish, consisted of 22 questions, some of which were multiple choice and some of which were free-response. Of the 644 respondents, nearly 60% were current deputies, nearly 29% alternate deputies and the remaining were former deputies or alternate deputies. Just over 51% of the respondents were in the lay order, while just over 48% of respondents were clergy. Respondents identified as male and female in about the same numbers, and several respondents chose not to identify their gender or identified as either non-binary or transgender.

Over 80% of those who responded identify as white, while just over 10% identify as Black, African American, Afro Caribbean or African immigrant. Just under 2% identified as Indigenous, Alaskan Native or Native American, 1.86% identified as Asian, 1.4% as Latino/a/x, under 1% as Hawaiian or Pacific Islander and just under 2.5% preferred to self-describe. Although the percentage of Black deputies who responded is equivalent to the percentage of Black deputies in 2018, the percentages of Latino/a/x, Asian, and other people of color who responded are slightly lower than the percentage of deputies who identify with those race and ethnicity descriptions.

Half of the survey responses came from those born between 1946-1964, the cohort commonly identified as the Baby Boomers, and another 25% were born between 1965-1980; the years of the Gen X generation. Those born between 1981 and 1996--the Millennial years--constituted 12.4% of respondents. Another 11.8% of respondents were born between 1928-1945--the years of the Silent Generation's birth--and just under 1% of those surveyed were born after 1997, in the years that are coming to be known as the birth years of Gen Z.

While the subcommittee was hoping for a more racially diverse group of respondents, we recognize that the demographics of respondents in fact represent the membership, historically and currently, of our church. That is, historically, predominantly white⁽¹⁾. The church continues to work toward full inclusion and of non-white members and the equality of all members of the church, but diversity, equity and inclusion efforts, particularly racial justice and reconciliation work, require sustained effort. We will not be able to live fully into God's dream for the church until we make this effort as a whole body, with our whole hearts. In fact, when asked in this survey how urgent the work of dismantling systemic racism is, 91% of deputies said the work is urgent.

Several survey questions focused on the work of legislative committees. Nearly 40% of deputies who took the survey responded that they have served on a legislative committee at at least one General Convention. The majority believe legislative committees to be efficient to highly efficient, and just under 10% stated that legislative committees are inefficient to highly inefficient. Legislative hearings were rated nearly the same in each category. When given the opportunity to provide independent answers, more than half who provided individual feedback indicated that having legislative

committees convene via video or teleconference before the start of convention would be a benefit not only to the work of the committees, but also to the efficiency of the whole convention. Respondents also favored having legislative committee meetings and especially legislative hearings conducted virtually, believing that doing so would allow greater access to these proceedings. Overall, the legislative process was deemed efficient by the majority of survey respondents.

Efficiency for the House of Deputies' legislative sessions was rated as efficient by 38% and highly efficient by nearly 16%. Nearly 20% felt neutral, and just under 11% perceived legislative sessions to be inefficient or highly inefficient. Much of the free response feedback concerning the efficiency of convention overall suggested that legislative committees meet ahead of convention, that convention be shortened, or in some cases, that the number of attendees be reduced. Many respondents suggested limiting the number of resolutions that may be presented, or limiting the types of resolutions which may be presented. Many suggested that resolutions should be considered only if they have an immediate effect on the church, and some suggested that resolutions concerning government policy should not be considered. While all of the feedback is appreciated, the subcommittee believes that, in order to be faithful to our call to respect the dignity of every human being, it would be irresponsible to consider only those resolutions that have a direct or tangible outcome, or are limited to ecclesiastical matters. Our involvement in the broader community and world is paramount to our ministry as Episcopalians.

The vast majority of respondents do not have minor children living at home. Among those who do, some indicated that their responsibility to care for children negatively affects their ability to participate in General Convention, and some were neutral on the issue. Several members of the State of the Church Committee are parents of young children, and we understand that taking time away for nine-plus days can be a significant challenge. Traveling and caring for an infant while serving as a deputy, paying for additional childcare at convention or at home, delegating responsibility to other family members while away, and managing the financial strain of all of these factors is significant. Survey respondents strongly supported providing childcare at convention without making it a financial burden to deputies or dioceses, and having childcare available during all times business is conducted, including legislative committee meetings and hearings.

When asked to prioritize one change to General Convention, 32% of respondents said they would make it shorter, and 23% would make it more affordable. In the free response, those two options were linked; many deputies stated that making convention shorter would also make it more affordable. Those who suggested allowing fewer resolutions indicated in their response that doing so would help make convention shorter. A handful of respondents included convening General Convention more often. This approach would not necessarily make the Convention more efficient,

because there would still be scheduling and affordability challenges, as well as increased burdens for travel on deputations. Additionally, the work of interim bodies would be abbreviated and valuable work during the triennium might be inhibited. Of course, now that virtual meetings have become the norm, the use of videoconferencing would make it possible to meet more regularly without the added time and expense of in-person meetings.

In the survey of deputies, we also sought to gauge the energy for restructuring the church. Specifically, we asked if deputies thought restructuring the church was a priority. Slightly more than half of deputies answered “yes” to the yes-or-no question. We then asked respondents what restructuring the church looks like to them. As one might imagine, the ideas and goals named varied widely. Some of the most common themes were:

- Sharing authority, so that responsibility is more evenly distributed between bishops, clergy and lay people;
- Finding ways to move church offices to a more accessible and less expensive location than New York City or have offices spread out geographically;
- Rerouting funds from literal brick and mortar operations back into churches, in particular small and rural congregations;
- Utilizing technology and the ability to gather virtually to our advantage by traveling less for meetings and making meetings more accessible for all;
- Evaluating the number of dioceses and explore merging some of them; addressing overlaps in the oversight of church staff and interim bodies;
- encouraging bi-vocational clergy and provide training and resources for those clergy and the lay leaders of the congregations they serve;
- Addressing the high monetary cost of the health plan required for full-time clergy and church employees, which is increasingly becoming a barrier to congregations hiring a full-time priest;
- Changing the way we meet and worship to meet the current needs and realities of peoples' lives;
- Focusing on evangelism and outreach more than inner church workings and governance;
- Fostering greater community engagement - recognizing and embracing lay leadership in congregations, diocese and the greater Church;
- Using the lessons of being church during the the Covid-19 pandemic to figure out our future priorities; and

- Acknowledging our part in systemic racism, providing training and resources for anti-racism work, and helping those who have been hurt by the church find healing.

There were a handful of suggestions about making deputations smaller. The committee understands that for the most part this suggestion was meant to reduce the costs and length of General Convention. We suggest that the General Convention budget provide financial resources to assist dioceses for which the cost of sending a full deputation to General Convention is a barrier.

The survey also sought to assess the barriers to ministry faced by deputies and their congregations and dioceses. Deputies were asked to choose as many as applied from this list:

- buildings
- geographic isolation
- racism
- funding
- gender discrimination
- homophobia
- structures of authority
- barriers to technology
- ordination process
- clergy shortage
- lack of lay leadership training
- lack of clergy training
- other

Funding is the most commonly cited obstacle, at 69%, followed by lack of lay training at 53% and racism at 39%. Access to technology and structures of authority followed, with just over 30% and just under 30%, respectively. Geographic isolation is also a major concern. A small number, about 8%, chose every single option presented. While this number is not huge, this committee wishes to make a note of these findings.

Other responses included burnout of leaders (both clergy and lay), lack of access to creative liturgy and music, lack of time and people, lack of bilingual clergy, divisions in congregational, diocesan and wider church structures, and the pandemic.

Respondents were also asked to select their primary obstacle from the list. Funding was again cited most often, followed by lack of lay leadership training, structures of authority and “other.” The “other” responses again highlighted burnout, apathy, lack of vision, administrative demands, classism and aging membership.

Innovative Ministry

The survey also asked deputies about innovative ministries happening in their contexts, and this question resulted in a high volume of responses. Many deputies are encouraged by the work their diocese is doing to address racism and work toward racial reconciliation by introducing programming, developing more robust programming and working directly in communities to build relationships and create shared ministry. Social justice outreach remains a strong priority.

Many respondents reported live streaming or pre-recording their worship services during the COVID-19 pandemic. It is important to recognize that in this pandemic time, when we have been forced to be adaptive, that online worship is indeed innovative, especially for a denomination that has strongly resisted, on the whole, worship outside of church walls. And it is equally important to recognize that this is still something which is not an option for many in our church, whether due to a congregation not having the ability or technology to provide virtual worship, or for parishioners who are unable to access the technology needed to attend virtual worship. These disparities must be addressed. At the same time, several respondents highlighted new Spanish-speaking services or congregations, and many reported worship and outreach initiatives to Indigenous people. These ministries must continue and expand.

Many congregations worked to supply their members with items for worship, particularly Advent baskets with candles and prayers, ashes to go baskets with ashes and prayers, and other forms of tangible outreach. Drive-by blessings or other services have been created. We are grateful for and inspired by this work and witness.

Based on survey responses, many congregations are hosting food pantries and clothing drives and are responding to the needs of those suffering from addiction. Some have also been able to offer laundry services for homeless people, grab-and-go meals, shelters and clinics. Our church buildings offer meeting spaces, provide counseling centers for those struggling with addiction and welcome those who live on the edge of society. This is essential work.

Other innovative ministries reported include art camps, vacation Bible school camps, hybrid summer camps to accommodate pandemic restrictions and reach out to the younger members of communities. In many cases this has brought newcomers to congregations. Creative formation has

been available to many age groups, including seniors, during the pandemic, helping alleviate the isolation which has plagued so many people during the past year.

Our committee was inspired by all of the responses, and especially by the clear commitment to being Christ in the world.

Racial Justice and Anti-Racism Training Responses

Nearly 73% of respondents answered that they have attended some form of anti-racism training lasting longer than five hours. 174 have either not completed a training, or it was under five hours in length.

Respondents were asked to select from a variety of anti-racism trainings and asked them to select which one(s) they have attended. The list comprised: Sacred Ground, Seeing the Face of God, Racial Equality Institute, VISIONS, Kaleidoscope, Crossroads, Dismantling Racism or “other” and invited them to list whatever trainings fell under “other.” Trainings not listed in our dropdown, in the “other” category, represented the highest number of trainings deputies have taken. Dismantling Racism has the highest number of attendees at 158, with Racial Equality Institute the fewest at 19. The other trainings fall between those, with between 30 and 90 attendees each.

Several trainings listed in the “other” category, identified by the deputies who answered, include programs provided by their diocese, seminary or congregation. The Absalom Jones Center and Becoming the Beloved Community were mentioned specifically. Some indicated that they have taken a training with a church-wide committee, commission, board or Executive Council. We are encouraged that several deputies indicated that their diocese is rolling out an anti-racism training or program. Others have taken training through a non-church workplace or other denomination’s training, and many are reading to educate themselves.

We note that a number of deputies reported that they have attended programs that are not actual anti-racism trainings, including Safeguarding God’s Children, The College for Congregational Development and Living Compass. A number also reported diocesan-level trainings that did not go well, and made attendees of color feel discriminated against because of either the presentation of material or content of material. When anti-racism trainings are offered, the curriculum, presentation and overall experience of attendees should be carefully considered. Input on content and experience should be sought from members of the community or diocese, especially members of color, to avoid any participant feeling less than or discriminated against.

Nearly 42% of deputies believe that racial justice work in the church is “extremely urgent.” 36% report it as “urgent” and over 12% as “somewhat urgent.” Those indicating “neutral” or “not urgent” were below 10%.

Parochial Report

The House of Deputies Committee on the State of the Church has canonical responsibility for approving the content of the Parochial and Diocesan Reports, which are then authorized by Executive Council for use. This triennium, the State of the Church Committee has been responsible for designing a new parochial report based on resolution 2018-A053.

2018-A053 Design a New Parochial Report

Resolved, the House of Deputies concurring, That the 79th General Convention charge the House of Deputies Committee on the State of the Church to work with the Office of the General Convention and Executive Council to design a simplified parochial report relevant to the diversity of the Episcopal Church’s participation in God’s mission in the world, and be it further

Resolved, that the House of Deputies Committee on the State of the Church solicit input from critical parochial report stakeholders including: (1) data providers to ensure that the data is easily collected and compiled and (2) data users to ensure that the data collected is relevant to their work, and be it further

Resolved, that the user interface be improved both for entering data and downloading data and to provide an application programming interface to allow data to be integrated into other networked tools for broader sharing and analysis.

A primary goal of our committee has been to create a parochial report that would measure lead metrics and indicators of vitality, rather than only trailing metrics that indicate what happened in the past. Our hope has been to create a parochial report that can help guide decisions for the future, not simply report on what has already happened. A comprehensive report should capture qualitative data in addition to the quantitative data that has been the standard for the parochial report in recent history.

Likewise, the church communicates what it cares about by what it measures. This has led to an overemphasis on average Sunday attendance (ASA) as a stand-alone metric rather than viewing it in context, and critiques that the church is interested in attendance and finances only and not other indicators of vitality.

Canonically, only four questions are required on the parochial report:

- The number of baptisms, confirmations, marriages and burials during the year
- The total number of baptized members
- The total number of communicants in good standing
- The total number of communicants in good standing under 16 years of age.

In preparing to draft a new parochial report, a sub-committee conducted interviews with members of the House of Bishops, staff of the DFMS, including the General Convention Office, and the Church Pension Group. Feedback and recommendations were also solicited on social media platforms, including Facebook groups for Episcopalians and parish clergy.

To better understand the history of the parochial report, the President of the House of Deputies commissioned a research report from the Episcopal Archives titled, “Development of the Annual Parochial and Diocesan Report” (April 2019). It is included as an appendix to this report.

The parochial report subcommittee also reviewed congregational reports from different denominations, including the ELCA, to determine best practices. Of note is a shift in the ELCA to tracking Average Weekly Attendance instead of Average Sunday Attendance and a greater emphasis on total active participants in the congregation.

Using this data, the State of the Church Committee began work on a revision of the parochial report that includes more comprehensive demographic data that can be tracked over time; metrics that give a fuller picture of active participation; engagement with the wider community; narrative questions; and a finance page that is easier to complete.

The State of the Church Committee is also responsible for the Diocesan Report that all dioceses submit. Each diocese has its own formula for calculating congregational assessment or apportionment. Some dioceses use parochial report data to collect this and others do not. We discovered that there is no central database that collects the assessment formula for each diocese, so we added that question to the Diocesan Report.

The work on a full revision of the parochial report was suspended when it became clear the COVID pandemic was having a dramatic impact on the life of congregations. In consultation with Executive Council, we made the decision to develop a special 2020 edition of the parochial report to address the reality of the pandemic. Our desire was to capture how churches responded to the pandemic, particularly in the area of worship, so that best practices could be identified. We made the decision not to track online attendance data for 2020, but to gather data about how congregations worshipped online and to work on developing a standard that could be used for online attendance

as distinct from in-person attendance. We also added narrative questions and questions on racial justice and reconciliation to the report.

It is essential that the church do more comprehensive analysis of responses to the parochial report, including the qualitative narrative questions. The church at all levels should use parochial report data analysis to help make decisions for the future. The very real picture of decline needs to be understood in context, and greater attention should be given to identifying indicators of vitality. Our resolution asking the General Convention to allocate funding for research capacity would help achieve that goal.

In 2021, the State of the Church Committee will revise the 2020 edition of the parochial report so it can be used to collect 2021 data, and then return to our original project of developing a full revision of the parochial report to submit to Executive Council. General Convention must approve only revisions to the report that impact its canonical requirements.

In recent years, as denominational loyalty has lessened and understanding of membership have shifted, particularly among younger generations⁽²⁾, the category of “communicant in good standing” has become more difficult for many congregations to track and less reliable as a way to measure active lay participation. Particularly in some geographic regions, formal letters of transfer are seldom used and people may come to Episcopal churches from denominations in which their baptisms were not recorded. As congregations gathered online during the COVID-19 pandemic, communicants in good standing became even more difficult to measure, as many people attended worship online at churches geographically distant from them. The rise of hybrid worship in the wake of the pandemic many mean that many continue to do so. Because the category of “communicant in good standing” is used extensively in the Constitution and Canons of The Episcopal Church and in many diocesan canons, further work is needed to refine how the Episcopal Church understands membership and how eligibility to participate in church governance should be assessed. Our Membership Subcommittee intends to continue this work and to present a report and related resolution(s) to the General Convention in 2022.

Likewise, further work is needed to establish context for membership and attendance data collected in the parochial report. In some regions of the United States, as much as 40% of people attend church each week, whereas in other regions, the number is half that⁽³⁾. Similarly, the percentage of baptized Episcopalians who attend church each week varies by region, from 26% in Province II to 35% in Province V⁽⁴⁾. These geographical and cultural variations both in the Episcopal Church and in the broader culture need to be taken into consideration when comparing Average Sunday Attendance

numbers across the church and using attendance data as a measure of church vitality. We hope to address these issues in our remaining work and revision of the parochial report.

In addition, while the General Convention Office does receive some ministry reports from non-parochial ministries, at present there is no method for tracking worship attendance at Episcopal schools, camps and conference centers and chaplaincies. As a result, a true picture of the reach and impact of the church is missing. We intend to address this issue in the full revision of the parochial report that we will submit to Executive Council.

The State of the Church Committee is continuing its work on the parochial report beyond the Blue Book deadline. Working with Executive Council and coordinating with the General Convention Office on implementation, the committee will complete a full revision of the parochial report prior to General Convention in 2022.

Recommendations:

- The House of Deputies State of the Church Committee and Executive Council should review the parochial and diocesan reports every triennia and make revisions as needed to ensure relevancy of the reports.
- Further work is needed to evaluate the canonical category of Communicant in Good Standing to determine if it still serves the church well. Communicant in Good Standing is so interwoven into the canons and church governance that a significant effort would be needed to adjust or change this canonical category to better meet the adaptive reality of the church today. Our Membership Subcommittee will begin this work before General Convention in 2022 and plans to present a report and related resolution(s) to the General Convention in 2022.

End Notes

(1) Demographic information on the House of Deputies is available for the 79th General Convention in 2018: <https://houseofdeputies.org/2018/07/03/demographics-of-the-house-of-deputies-at-gc79/> , and for the 78th General Convention in 2015: <https://houseofdeputies.org/2015/08/04/demographics-house-deputies/>

(2) <https://www.pewresearch.org/social-trends/2014/03/07/millennials-in-adulthood/>

(3) <https://www.pewforum.org/religious-landscape-study/compare/attendance-at-religious-services/by/metro-area/>

(4) <https://www.generalconvention.org/membership-and-average-attendance>

Proposed resolutions

A097 Evaluating Experiments in Adaptive Change

Resolved, the House of _____ concurring, That the Presiding Officers' decision to convene legislative committees and resolution hearings in advance of the 80th General Convention be commended as an experiment that can help the Episcopal Church learn more about how to adapt its structures and governance to the post-COVID world; and be it further

Resolved, that Executive Council conduct, with professional support from program evaluation specialists, an evaluation of the process by which legislative committees and resolution hearings convened online in advance of General Convention and of the outcomes for the church; and be it further

Resolved, that the evaluation include assessment of the ways in which conducting legislative committee business online promoted or hindered diversity, equity and inclusion and the involvement of people in the wider church, particularly people of color, people younger than age 40, and people from dioceses outside the United States; and be it further

Resolved, that Executive Council conduct this program evaluation with the intent of creating a model for evaluation of future adaptive change experiments, recognizing that the Episcopal Church must continue to change and evolve in order to respond to God's mission in all of its contexts.

EXPLANATION

The Episcopal Church must develop the discipline of making experimental changes in its polity, governance and structure and evaluating those experiments. By learning to experiment without fear of failure or retribution, gather evaluative data, and then refine our experiments, we will be more able to face the challenges facing the institutional church and to participate in God's mission in the 21st century.

A098 On Online Tools for Adaptive Leadership

Resolved, the House of _____ concurring, That the 80th General Convention direct the Executive Council to oversee the development of collaborative online tools that can facilitate the work of interim bodies committed to leading adaptive change in the Episcopal Church; and be it further

Resolved, that the chair and vice-chair of Executive Council, in consultation with the Executive Council Joint Standing Committee on Governance and Operations, appoint a task force of experienced churchwide leaders to make recommendations about the range of communication and collaboration tools needed to support adaptive change work, including tools that will facilitate real-time collaboration, be responsive on mobile devices, and entirely replace the current Extranet platform; and be it further

Resolved, that the General Convention Office be directed to implement the recommendations of the task force in time for use by the 81st General Convention; and be it further

Resolved, that \$250,000 be budgeted for the subscription, development and implementation of these tools.

EXPLANATION

Despite significant investment of time and money, the Extranet is a hindrance to the kind of real-time collaborative work required to facilitate adaptive change in the church. The Extranet is not intuitive, it does not provide the options for real-time interaction, and it does not thread messages. Leaders who have been stymied by its inadequacies have been forced to informal use of other tools; as a result, information and records about the work of churchwide bodies is dispersed and often unavailable. Especially during the pandemic, the church's lack of capacity to collaborate has significantly limited the ability of its leaders to respond to rapidly changing circumstances and contexts. The leaders who are most in need of tools that work, and who have been most affected by the inadequate nature of the current platform, should lead this work.

A099 Research Capacity for The Episcopal Church

Resolved, the House of _____ concurring, That The Episcopal Church establish and fund significant professional research expertise and capacity to collect, aggregate, analyze, and publish data to support and bring insight, facts and understanding to the work of the General Convention, the Executive Council and all commissions, committees, boards and task forces of the church; and be it further

Resolved, that The Episcopal Church prioritize developing data expertise and capacity to advance adaptive change processes, including experimentation and evaluation, that can invigorate the church's participation in God's mission in the 21st century; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$450,000 for the implementation of this resolution.

EXPLANATION

During its work in this triennium, the House of Deputies State of the Church Committee, charged with being “an energetic think tank and incubator for adaptive thinking, innovative ideas, and fresh approaches to the church’s leadership, organizational thinking, and common life,” found itself limited by the Episcopal Church’s lack of meaningful capacity to collect and analyze data in a coordinated way. Other interim bodies also struggled to formulate and conduct research, and at times, many overlapping surveys were put in the field by disparate committees with no way to coordinate. In order for the Episcopal Church to be the body of Christ in a world that badly needs our witness, we must have professional research expertise capacity that can help us reclaim and reinvent the church.

Supplemental Materials

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1. [Development of the Annual Parochial and Diocesan Report - The Archives of the Episcopal Church - Research Report - April 24, 2019](#)

**The Archives of the Episcopal Church
Research Report
Development of the Annual Parochial and Diocesan
Report April 24, 2019**

Sources of Authority

The first canonical legislation, “providing for an accurate view of the State of the Church,” was enacted in 1804, when the General Convention mandated regular annual reporting by the clergy of their sacramental acts and the adult persons in their cure. This canon (now I.6) serves as the core of the current data gathering process and its oversight as assigned by General Convention. The State of the Church Committee (the Committee) was created in 1808 to shepherd the reporting process. It recommended the first standardized form in 1874, but the mandatory use of a standard form and fixed due dates was not established until 1916.¹ In 1958, responsibility for preparing the form was canonically transferred from the Committee to the National Council.²

In addition to Canon I.6, the parochial report must conform to other canonical provisions. The effective canons are currently numbered:

- Canon I.4.6(k). Diocesan report on congregations
- Canon I.7. Of Business Methods in Church Affairs
- Canon I.17. Of Regulations Respecting the Laity
- Canon II.1. Of the Due Celebration of Sundays
- Canon III.9.6. Rectors and Priests-in-Charge and Their Duties
- Canon III.12.3. Duties of Bishops

Evolution of the Parochial Report Process and the State of the Church Report

A survey of parochial reporting in the early decades after 1808 showed a wide variety of styles, which ranged from brief statistics to long narrative reports. Early reports of the Committee on the State of the Church contained few statistics. They analyzed trends of decline or growth and give broad impressions of the spiritual state of the congregations. Not unusual, for example, was the committee’s observation in 1811 that the many churches in Massachusetts were “in a state of derangement and decay”; other dioceses were reported to show “an increase in zeal” and “respect for, and attachment to the church, seems to be growing in several places.”³

¹ Journal of General Convention, 1916, pp. 184-185, p. 371.

² Constitution and Canons, 1958, Canon 5.1, p. 20.

³ Journal, 1811, pp. 275-276.

It is clear that the early reports made no pretense to being emotionally detached from the data. Local information on the state of the Church was understood in providential terms and described with the passion and holistic interpretation of God's revealed presence.⁴ Statistical information improved as the Church became more firmly established, but the reports tended to focus on metrics such as unity, hopefulness, and a profound seriousness of purpose. Reports focused on what was important to the local Church and typically emphasized the observation of the Church's canons and rubrics.

As the nineteenth century progressed, the list of requested parochial information increased. In 1853, parishes were asked to add Sunday Schools, the amount of communion alms, and contributions for missions and parochial schools; in 1874, the Committee requested information about the value of church property and debts, and breakdowns of offerings by intended missionary purpose (chiefly African American and Native American work, home mission, foreign mission).

The added information enabled the Committee to report on unexplored areas of opportunity or neglect, which closely tracked social developments of the era. By the end of the 1880s and 90s, reports resembled sermons, addressing both moral issues and the Church's failure to attend to the unchurched and underserved populations.⁵ The Committee noted Diocesan returns that attested to the establishment of evangelical organizations such as the Brotherhood of St. Andrew, the Church Temperance Society, and other groups devoted to "personal and social purity in the highest and strictest sense."⁶

The 1916 report of the Joint Commission on Business Methods in Church Affairs led to canonical changes that standardized and routinized the process (though not the content) of parochial data gathering. For the first time, blank forms were officially mandated for all parishes and dioceses, and strict deadlines were established.⁷ A canonical amendment in 1937 required tabulation of information separately for each of the triennium's three years.⁸

In keeping with the contemporary invocation of scientific methods to business management, the Committee's reports became increasingly oriented around the evident facts of plain statistics from approximately 1925 forward. The evocative qualitative data of the first 150 years of reporting were replaced with the drier analysis of standard statistical counts, such as membership, budgets, and property value. By 1961, for example, the Committee reported on trends by extrapolating from five years of data (1955-1960) to project trends for ten years out in an "attempt to show the movement and direction of the

⁴ Early statistics and narratives were vivid and summarily indicative of the current state. In 1820, North Carolina informed that they had "hung their harps upon the willows in almost hopeless anguish" due to "the desolation with which [Divine] justice had visited [it]"; in Virginia, "The Almighty continues his gracious smiles to this part of his church." The relatively small size of the antebellum Church allowed bishops an accurate sense of the pockets of growth and decline.

⁵ *Journal*, 1880, p. 360.

⁶ *Journal*, 1886, p. 589. ["The twin monsters of evil which are sapping our homes and people are Intemperance and Impurity" is a sample of the prose style.]

⁷ *Journal*, 1916, pp. 284-285, p. 371.

⁸ *Journal*, 1937, pp. 194-195.

church's life and to project, by scientific means, what the immediate future holds—if the trends remain constant.”⁹

A key twentieth century turning point came when the 1958 Committee lamented the variability of the data it was receiving, while nonetheless asserting the data's potential for telling a great deal about the state of the Church. It recommended creation of a treasurer's manual to improve the local data quality and began working with the headquarters staff of the Unit of Research and Field Study.¹⁰ From this point onward, each Committee generally tapped staff researchers or statisticians to help with design and interpretation. Statistical support moved in 1955 from the Mission Program area's research division to the General Convention Treasurer, and then back to the General Convention Secretary in 1995.

In recent years, interest has increased in identifying ways of documenting “the dynamics of a changing church,” including emerging church trends, non-traditional services, and mission work that brings the congregation into contact with the community.¹¹ The 2003 Committee report echoed the observations of previous and subsequent committees regarding parochial report “issues and limitations” and stated further: “The committee is acutely aware that the parochial reports only begin to give a picture of the ‘state of the church’ as we enter a new millennium.” The missing information included, “what we believe and why we believe,” detailed demographics about members, visitors, and program participants, and the character and effectiveness of congregational ministry.¹² In 2015 the Committee asked: “What if we have been looking at the phenomenology of church life using inadequate and/or inaccurate measures?”¹³

Reasons for Parochial Report Revision

Historically, parochial report forms have been revised for one of four reasons:

1. for housekeeping purposes (e.g., due date, mode of submission, and to improve compliance)
2. to bring them into conformity with changes in the Canons
3. to make them conform to current data gathering trends
4. to collect information relevant to the Church's current needs that was not previously collected or was not collected in the form that it now needed. Since the middle of the last century, revisions to obtain data amenable to statistical analysis have been common.

Although responsibility for the form of the parochial report has been shared since 1958 between the Executive Council and the State of the Church Committee, other Church bodies often requested changes or actively participate in form revision. At one time or another, interim bodies have advocated for proposed changes to the form, notably the Standing Commission on the Structure of the Church, the

⁹ *Journal*, 1961, p. 686. The ten-year analysis warned (incorrectly) of a dire clergy shortage and (correctly) of an apparent trend in a declining rate of new baptized Episcopalians compared to an increased rate of receptions from other churches.

¹⁰ *Journal*, 1958, p. 653.

¹¹ State of the Church Committee. *Blue Book Report*, 2015, p. 71.

¹² State of the Church Committee. *Blue Book Report*, 2003, p. 341-342.

¹³ State of the Church Committee. *Blue Book Report*, 2015, p. 75.

Standing Commission on Evangelism, the Standing Commission on the Church in Small Communities, Executive Council's Committee on Congregations in Ministry, the Committee on the Status of Women, and the Executive Council Committee on Anti-Racism.

Consequently, nearly every triennium brings concrete changes or suggestions for change. Although the way that categories have been defined and tabulated has changed from time to time, certain traditional parochial data elements have persisted: numbers of members, sacramental acts, worship services, finances, property, information about mission work and outreach, and average Sunday attendance.

Presentation and Compliance Issues

A recurring complaint heard by or from the Committee throughout the history of the parochial report is that of inadequate data or confusing presentations. Committee reports recounted typical difficulties: poor compliance by parishes and dioceses, confusing definitions of membership, perceived faults in the forms for not collecting useful data, the unnecessary complexity of the request, and the centralization of data compilation so as to diminish its best local use, whether for statistical analysis or for such purposes as evangelism.¹⁴ In general, the Committee has responded reflexively by revising the forms, creating better instructions, and providing training to improve compliance and reduce complaints.

In the last three decades, the rate of compliance appears to be significantly better than in the past, possibly as the cumulative result of experience combined with expert advice in creating easier forms. Since 1958, most committees have had support from experienced statisticians.¹⁵ A thorough and collaborative review of the forms and the process in 1995, at a time of great intensity in the Church, resulted in 100% compliance from the dioceses (though less than 100% from the parishes). Twenty-first century Committee reports have shown compliance of over 90%.¹⁶

Membership Requirements Affecting the Parochial Report

Historically, a key point of confusion and change in the reports has circled around the various definitions of “member,” “communicant,” “confirmed communicant,” and “communicant in good standing,” that have been used to describe congregants over the years. These changes have been driven largely, although not exclusively, by changes in the canons and attempts to quantify persistent Church members or communicants (as opposed to all baptized members regardless of their continuing affiliation).

The Convention began receiving memorials asking for a clear definition of the term “communicant” in 1934. These requests were not acted on, even after 1952 when the canons were altered to add the phrase “in good standing.” It was not until 1961 that the General Convention added several sections to what was

¹⁴ State of the Church Committee. *Blue Book Report*, 1985, p. 284.

¹⁵ *Journal*, 1958, p. 651, pp. 654-655.

¹⁶ State of the Church Committee. *Blue Book Reports*: 1997, p. 406; 2003, p. 342; 2009, p. 61; 2012, p. 62; 2015, p. 78. Recently reported return rates have been cited as 96% (in 2003); 92% (2009); 94% (2012); 94% (2015).

then Canon 16 (On Regulations Respecting the Laity) defining these terms. A baptized member was defined as a person who was baptized with water and whose baptism was recorded in this Church. A communicant in good standing was defined as a person who was confirmed or received by the Church, and who had received Holy Communion at least three times in the prior year. These definitions were retained until 1982.

The 1982 Convention saw a number of major canonical revisions, many of which centered around confirmation as a prerequisite for full membership in the life of the Church. The canon on Regulations Respecting the Laity (then Canon I.16) was amended to reflect these changes as well.¹⁷ The definition of a baptized member was not changed drastically, adding only a clause that a baptism could occur at any Christian Church (as long as it was recorded by the Episcopal Church). Several changes were made, however, to the definition of communicant.

The amended canon distinguished between communicants above and below the age of sixteen. Further, a communicant was defined as a Church member who had received Holy Communion at least three times during the preceding year. (This was previously the definition of a *communicant in good standing*). However, communicants in good standing were now defined to be communicants, “who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God.”

In 1985, as part of a larger effort to emphasize the importance of confirmation in Church membership, the Standing Commission on Constitution and Canons recommended major revisions to the Canons. One of these changes was to delete the report on baptized members and communicants in good standing in favor of an elaborate division into the following six categories:

1. the total number of adult baptized members
2. baptized members under sixteen years of age
3. total number of all baptized members
4. total number of confirmed adult communicants in good standing
5. total number of confirmed communicants in good standing under 16 years of age
6. total number of confirmed communicants in good standing¹⁸

In 1997 the total number of confirmed adult communicants was added to replace the term “confirmed,” which was dropped from categories 4 to 6.¹⁹

The House of Deputies Standing Committee on the State of the Church recommended further revisions to this canon to the 2000 General Convention, citing an Executive Council directive to simplify the parochial report. General Convention amended the requirements of Canon I.6.1 to require only the

¹⁷ *Acts of Convention*, 1982-A048.

¹⁸ *Acts of Convention*, 1985-A015.

¹⁹ *Acts of Convention*, 1997-A131.

following information: 1) total number of baptized members; 2) total number of communicants in good standing; and 3) total number of communicants in good standing under the age of sixteen.²⁰

At the 2000 Convention, what currently exists now as Canon I.17 was amended alongside the canon on parochial reports (see above.) Resolution 2000-A104 deleted the phrase defining the general term “communicant,” leaving only the definitions of “baptized member” and “communicant in good standing,” which have been unchanged since their revision in 1982.

The Impact of Change: the Case of Parochial Report Revisions of 1986

The most complete extant documentation illustrating the interrelatedness of the parochial report revision process took place between 1982 and 1993, involves changes in the definitions of “communicant,” and demonstrates with exceptional clarity the sensitivity inherent in the parochial report’s wording and local interpretation.

As noted earlier, changes in the Canons in 1982 and 1985 led to changes in the parochial report forms. All of the changes in the form were vetted through the research support staff, training was provided in the use of the new form, and the form was approved by Executive Council. However, despite careful and thoughtful planning and implementation, the revision netted unanticipated results.

Respondents found the increased number of communicant categories confusing, especially a request to ascertain the number for “active” communicants, a term which was not defined anywhere in the canons or the instructions. This caused respondents to report fewer communicants, leading in turn to membership statistics that showed a significant drop (later described as “precipitous”) for 1986.²¹ The treasurer later wrote: “This difference is significant enough statistically but it is more politically and emotionally significant in the life of the Church. The ripple effect resulted in a consequential refiguring of all the ratios to total Church membership, i.e., the proportion of per member giving, attendance, church school enrollment, etc.”²² Besides the debatable interpretation of the drop in membership, the reporting of baptized members by age category also did not work as expected. The sum of the members over and under age 16 never once in five years matched the total number of members reported.

The Church’s response to the alarming 1986 parochial report results was nearly immediate. In November of 1987 the Executive Council resolved to form a committee to review the parochial report and in 1988 the General Convention directed several of its interim bodies to study the funding of the church at all levels along with the accuracy and importance of parochial and diocesan reports. Council tasked the State

²⁰ *Acts of Convention*, 2000-A104.

²¹ State of the Church Committee. *Blue Book Report*, 2006, p. 49.

²² Memorandum. Treasurer to Ad Hoc Council Review Committee, August 29, 1989, p. 3.

of the Church Committee to work with the Church Center staff on educational workshops to assist in “the current and timely completion of the reports.”²³

As a result, in 1989 the Presiding Bishop appointed an Executive Council Ad Hoc Committee to Review the Parochial and Diocesan Reports. In keeping with the goals set by General Convention, the revisions focused largely on improving compliance, reliability, and accuracy of financial data. The Committee also hoped to find ways to help the Church see the reports, “as contributing to the essential aspects of mission; not just as a ‘tax report’.”²⁴ The Ad Hoc Committee invited input from clergy, parishes, and dioceses, whose questions included: definitions of “household” versus “family;” categories of communicants; and the difficulties of “counting noses” in a mobile society. The Committee reported its recommendations to Executive Council, which approved new and apparently successful forms in 1991.²⁵

The 1986 revision illustrates the impact that untested changes to the parochial report can have on foundational data points such as budgeting, assessments, and program development; changes in the reports, whether adding or deleting elements, can have both immediate and long-term effects. Years later, in an exceptionally detailed report to the General Convention, the 2006 State of the Church Committee noted that the Church’s in-house statistician reviewed past data and “restored certain elements of the annual reports to ensure historic continuity.”²⁶ The Committee stated its belief “that any future changes to the Parochial Report form must be made with care and in close consultation,” and expressed its hope to include “clergy deployment as well as representatives of the various racial, ethnic and age constituencies in the church.”²⁷

Obtaining an Expanded View of the Church Ministries

From as early as mid-twentieth century, State of the Church committees have been concerned that quoting the figures and percentages garnered from the parochial reports did not adequately assess what was really vital about the state of the Church.²⁸ In its 1970 report, the Committee firmly called out the limitation of statistical counts in obtaining an expanded view of ministry.

At a time when the Church was under more than usual stress internally and was also operating in a world marked by extreme division and change, the Committee withdrew altogether from the customary approach when it delivered its brief report. Instead, the Committee deferred to other CCAB bodies to report significant data points, noting that its usual brief summaries of non-statistical information were

²³ Executive Council, Minutes, Nov. 17-20, 1987, pp. 44-45, EXC111987-7; *Acts of Convention*, 1988-A084 and A160.

²⁴ Memo from George McGonigle to Bill Stough and Barry Menuetz, December 15, 1989, AR2010.011.

²⁵ Memorandum, Treasurer to State of the Church Committee, April 28, 1993, p. 4. The anomalous membership figure for 1986 was still being explained in State of the Church reports as late as 2006.

²⁶ State of the Church Committee. *Blue Book Report*, 2006, pp. 48-49.

²⁷ State of the Church Committee. *Blue Book Report*, 2006., p. 60.

²⁸ *Journal*, 1943, p. 548. [“To assess what is transpiring in the life of the Church by quoting figures and percentages is as difficult as ‘to catch the wind and hold it in your hands.’”]

“frequently superficial.” Returning to an earlier tradition of interpretive and thought-provoking commentary, the Committee declared that the Church’s state “is one of confusion, division, and tension.” It questioned both the current purpose of the Committee and what the figures said about the Church’s evangelism, stewardship, use of physical facilities, and forms of worship, and left the statistical report to Journal publication without further interpretation.²⁹

The State of the Church Committee did not issue a narrative report in 1973. In 1976, they requested Executive Council’s input on the forms and procedures to improve the reliability of reporting. Subsequent reports show the beginning of a more consistent interest by the Committee in finding ways to document other critical but less quantifiable elements of church health. In 1979, the Finance Office took the lead in coordinating input to supplement the parochial report data. The Committee later reported the success of this venture by noting, “An intensive survey was made to determine needs for data – demographics, attitudinal research, etc.”³⁰

The value of targeted supplementary data was apparent and led to multiple outcomes, including participation in an ecumenical effort to survey the unchurched in America, a survey relating to the schismatic movement conducted by the Statistical Officer, and a 1979 “Profile of Episcopalians.” The profile effort was repeated in 1981, and in 1996 a “Ministry Census” was conducted as a pilot prototype for a triennial survey of congregational involvement in ministry.³¹ These efforts to acquire broader and different information were conducted outside the parameters of the parochial report.

During the next decade, the State of the Church reports showed the Committee grappling with both the possibilities inherent in asking different questions than in the past and also with the issue of whether such information should be incorporated into the parochial report form. From the mid-1990s onward the Committee dealt with the question of accurately assessing the state of the Church, asking: “Is now the time for this committee to become not just a fact-finding group but a motivational force?” The Committee acknowledged that the parochial report “has really become an assets report.... It does not show ministry and mission information, and needs to do so.” At the time, the Committee decided that the parochial report would not be changed, “but an additional report will be prepared to gather broader information on the ministries and programs of congregations. This will be an every-three-year report, hopefully.”³²

Part of the energy surrounding these efforts to probe more deeply into local ministry activity stemmed from the desire of Church-wide bodies to have readily useful data. However, the 1997 Committee reported that the tabulated data on “other” local ministry (“beyond food pantries”) requested on the

²⁹ *Journal*, 1970, pp. 152-153; *Journal*, 1970, “Statistics for the Triennium 1967-1969,” pp. 664-721.

³⁰ State of the Church Committee. *Blue Book Report*, 1979, p. AA274.

³¹ “Episcopalians: Profile 1979” in State of the Church Committee. *Blue Book Report*, 1979, pp. AA273-282; “Episcopalians: Profile 1982” in *Report*, 1982, pp. AA-316-325; and *Report*, 1997, p. 406 (“Mission Census”), p. 408 (“Ministry Census”), and Appendix C (“Ministry Census”), pp. 434-435.

³² State of the Church Committee, Minutes, October 12, 1995.

parochial report form was not widely used or applied. Because the Committee itself “found an energizing and exciting wealth among the accounts of ministries reported,” it worked with Church Center staff to develop a survey of one-third of the congregations and received a 48% response rate. The Committee concluded: “This plan grew from our absolute conviction that the true state of the church is measured not by crunching numbers but by the ministry of the membership.”³³

Subsequently, such supplementary data has been collected on an ongoing basis, but independently of the parochial report. From 2000 through at least 2014, congregational surveys were conducted every two to three years.³⁴ The surveys explored questions that included detailed demographics (age, gender, race, age, income), size of sanctuaries and the character of worship, practices, programs, ministries, evangelism/recruitment, ordained and lay leadership characteristics, and contact with the community. The supplementary reports appear to have been sponsored and certainly advocated by the DFMS’s Program cluster of offices concerned with strengthening congregations.³⁵

The annual parochial report was designed to use quantitative data measures in evaluating Church growth and contraction. To ask that it also serve a second goal of assessing the qualitative impact of ministry services that are often designed to be unique in local presentation stretched the Church’s capacity for implementing standardized data gathering and analysis in a single survey package.

Summary

The parochial report form in its present state represents decades of development as a tool primarily intended for collecting consistent, basic, structural “hard data” regarding the state of the Church, what the Committee described in its 2015 report as indicators of congregational “viability, such as financial stability and effective administration.”³⁶ The current categories were structured for ease of use and accurate statistical analysis of the traditional units of measure for both short- and long-term purposes.

As of this report, the form has not been adjusted to capture much of the “soft” data that church agencies have been requesting since the late 1970s on what the 2015 Committee report terms “vitality,” defined as a sense of “passion, vibrancy, and a lively response to the dynamic challenges and opportunities of God’s

³³ State of the Church Committee. *Blue Book Report*, 1997, p. 408. A summary of results appears on pages 432-433 of the Blue Book report and a sample form appears on pages 434-435. Resolutions rejected since 2000 include a 2003 proposal to amend Canon I.6.1 to add a new subsection on ethnic representation; a 2006 proposal by the Committee on Education that included requiring adding to the annual Diocesan parochial report the names of young adult Diocesan board members; and a 2009 resolution to include data on the annual energy consumption of all Church properties.

³⁴ The surveys were undertaken mostly, possibly entirely, in conjunction with the Faith Communities Today (FACT) ecumenical/interfaith survey project. At present, all of the reports completed through FACT are available from the “Research Projects and Findings” menu on the FACT website at this page: <https://faithcommunitiestoday.org/>.

³⁵ See for example, C. Kirk Hadaway, “A Report on Episcopal Churches in the United States.” Office of Congregational Development, Domestic and Foreign Missionary Society, The Episcopal Church, April 2002.

³⁶ State of the Church Committee. *Blue Book Report*, 2015, p. 74.

Mission in the...world.”³⁷ It is apparent from the available reports that the State of the Church Committee repeatedly decided against trying to use the parochial report to collect broad categories of information regarding details of parish life beyond the standard units of measurement. More recent documentation of the State of the Church Committee’s work on the parochial report has not been retained for historical study.

It is noteworthy that for approximately twenty years the Church has accumulated a wealth of ancillary data that has been systematically gathered and interpreted for program planning, albeit through other survey instruments that go beyond the parochial report categories. Future work on the parochial report form and supplementary survey tools such as the “vitality index” suggested in the 2015 Committee report have a solid historical foundation on which to build.

³⁷ State of the Church Committee. *Blue Book Report*, 1979, p. AA-269; *Blue Book Report*, 2015, p. 74.

PRESIDENT OF THE HOUSE OF DEPUTIES COUNCIL OF ADVICE

Membership

The Rev. Gay Clark Jennings, <i>Chair</i>	Ohio, V	2021
The Rev. Devon Anderson	Minnesota, VI	2021
The Rev. Canon Dr. Michael Barlowe	California, VIII	2021
Mr. Michael Glass	San Joaquin, VIII	2021
Ms. Sally Johnson	Minnesota, VI	2021
Mr. Bryan Krislock	Olympia, VIII	2021
Mr. Ryan Kusumoto	Hawaii, VIII	2021
Mr. Thomas Little	Vermont, I	2021
The Rev. Lester Mackenzie	Los Angeles, VIII	2021
The Rt. Rev. Sean Rowe	Northwestern Pennsylvania, III	2021
The Hon. Byron Rushing	Massachusetts, I	2021

Mandate

CANON I.1.1 (b) states "The President shall be authorized to appoint an Advisory Council for consultation and advice in the performance of the duties of the office."

Summary of Work

COMMITTEE COMPOSITION

In this triennium, the president of the House of Deputies appointed people to the Advisory Council based on role and function.

- 1) The Rev. Devon Anderson is a member of the Joint Standing Committee on Planning and Arrangements.
- 2) The Rev. Canon Dr. Michael Barlowe is the secretary of the House of Deputies.
- 3) Mr. Michael Glass San Joaquin is vice chancellor to the president of the House of Deputies.

- 4) Ms. Sally Johnson Minnesota is chancellor to the president of the House of Deputies.
- 5) Mr. Bryan Krislock is parliamentarian of the House of Deputies.
- 6) Mr. Ryan Kusumoto is chair of the Committee on Dispatch of Business in the House of Deputies.
- 7) Mr. Thomas Little is vice parliamentarian of the House of Deputies.
- 8) The Rev. Lester Mackenzie is chaplain of the House of Deputies.
- 9) The Rt. Rev. Sean Rowe brings the perspectives of the House of Bishops to the Advisory Council.
- 10) Mr. Byron Rushing is vice president of the House of Deputies.

Meetings

The Council of Advice held its first meeting by Zoom on November 27, 2018. The next meeting was held in Linthicum Heights, Maryland on June 6-7, 2019. Due to the Covid-19 pandemic, no other in-person meetings were held, and the Council met by Zoom on July 21, 2020. The Council hopes to return to in-person meetings in advance of the 80th General Convention.

Budget

The Council of Advice was provided a budget of \$96,000 for the 2019-2021 triennium. The president based the budget on six (6) meetings during the 2019-2021 triennium; two (2) meetings in 2019, two (2) meetings in 2020, and two (2) meetings in 2021. However, due to the pandemic, no in-person meetings were conducted in 2020 therefore permitting \$16,000 to be returned to the General Convention operating budget. The additional \$16,000 was held in reserve for an additional in-person meeting in advance of the 80th General Convention. The 2022-2024 triennial budget request of \$102,000 is based on six (6) meetings, with a similarly sized Council of Advice.

AGENCIES & BOARDS

REPORTING TO GENERAL CONVENTION

Board for Transition Ministry

Board of the Archives of the Episcopal Church

Board of Trustees for the Church Pension Fund

Board of Trustees of the General Theological Seminary of the Episcopal Church

Court of Review

Disciplinary Board for Bishops

Episcopal Relief and Development Board of Directors

Forward Movement

General Board of Examining Chaplains

BOARD FOR TRANSITION MINISTRY

Membership

The Rev. Canon Elizabeth Easton, <i>Chair</i>	Nebraska, VI	2021
The Rev. Canon Victor H. Conrado, <i>Vice-Chair</i>	Chicago, V	2024
Ms. Denise Obando, <i>Secretary</i>	California, VIII	2021
The Rev. Dr. Gary Butterworth	Western North Carolina, IV	2024
The Rev. Canon Paula Clark	Washington, III	2021
The Rt. Rev. Douglas Fisher	Western Massachusetts, I	2021
The Rt. Rev. Daniel Gutiérrez	Pennsylvania, III	2024
Ms. Ellen McVey	Eastern Michigan, V	2024
Mrs. Anne Schmidt	Dallas, VII	2024
The Rt. Rev. Allen Shin	New York, II	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

Canon III.16.1 - 2

Sec. 1

a. There shall be a Board for Transition Ministry of the General Convention consisting of twelve members, four of whom shall be Bishops, four of whom shall be Presbyters or Deacons, and four of whom shall be Lay Persons.

b. The Bishops shall be appointed by the Presiding Bishop. The Priests or Deacons and Lay Members shall be appointed by the President of the House of Deputies. All appointments to the Board shall be subject to the confirmation of the General Convention.

c. The Members shall serve terms beginning with the adjournment of the meeting of the General Convention at which their appointments are confirmed, and ending with the adjournment of the second regular meeting thereafter. The members shall not serve successive terms.

d. At each regular meeting of the General Convention one-half of the membership shall be appointed to serve full terms.

e. Vacancies shall be filled by appointment by the Presiding Bishop or by the President of the House of Deputies, as appropriate. Such appointments shall be for the remaining unexpired portion of the members' terms, and, if a regular meeting of the General Convention intervenes, appointments for terms extending beyond such meetings shall be subject to confirmation of the General Convention. Members appointed to fill the vacancies shall not thereby be disqualified from appointment to full terms thereafter.

Sec. 2. The duties of the Board shall be:

- a. To oversee the Office for Transition Ministry.
- b. To provide support for the training of bishops and diocesan personnel in the transition ministry processes.
- c. To study the transition ministry needs and trends in the Episcopal Church and in other Christian bodies.
- d. To issue and distribute such reports and information concerning transition ministry as it deems helpful to the Church.
- d. To cooperate with the Centers for Mission and the other Boards, Commissions, and Agencies which are concerned with transition ministry, and particularly with the Executive Council.
- f. To report on its work and the work of the Office for Transition Ministry at each regular meeting of the General Convention.
- g. To report to the Executive Council annually as a part of its accountability to the Council for the funding which the Office for Transition Ministry receives.
- h. To work in cooperation with the Church Center Staff.
- i. To fulfill other responsibilities assigned to it by the General Convention.

Summary of Work

A Zoom meeting to elect officers for the Board occurred on January 23, 2019. The Rev. Elizabeth Easton and the Rev. Victor Conrado agreed to co-chair the Board. Ms. Denise Obando agreed to be the Secretary.

The Board gathered in person October 23-25, 2019 in Atlanta, Georgia. This was the only opportunity for an in-person meeting with the onset of the COVID-19 pandemic.

The Board met in its entirety one more time via Zoom on September 16, 2020, with various working groups convening throughout the year.

Participation by members of The Board for Transition Ministry was very low this triennium: a quorum was not reached for the October 2019 meeting, and the September 2020 meeting had the minimum number of members participate, raising questions about the mission of the Board and whether it is time to reconsider the group's mandate.

The Board for Transition Ministry is recommending that a member of the Church Pension Group (CPG) be invited to join future Board meetings as an *ex officio* member or guest. The Board recognizes an opportunity to optimize statistics and reports with Diocesan Transition Ministers if there is direct access to CPG.

The Board hoped to review data from CPG regarding their collection of voluntary reporting of clergy race, ethnicity, gender identity and sexual orientation. It is the Board's understanding that that data is still being gathered and will hopefully be available to the larger Church in the year to come.

Board members heard from Diocesan Transition Ministers from across TEC that trends from the past triennium still continue. Some of those trends include: the aging church, part-time clergy, diversifying clergy, dual-call couples, equity issues, and the call process.

Many new challenges this triennium focused on approaches to transitions during a pandemic. Some searches were completely paused while others moved forward using virtual tools for their discernment conversations. Priests left calls without the usual festive coffee hour celebration. New priests began calls without ever stepping foot on the grounds they found themselves now responsible for. Ordinations and consecrations continued but with very limited in-person participation while whole dioceses watched online. How to produce, edit, and lead online church offerings was never taught in an Episcopal seminary. In order to stay connected, clergy quickly learned how to use Facebook Live, Zoom and YouTube to provide worship, offer an opportunity for parishioners to stay in touch with each other, and find a way to maintain the business of the church.

An extremely successful gathering of nearly 100 Diocesan Transition Ministers occurred March 26-29, 2019 in Salt Lake City, Utah. Professional development, beautiful liturgy, and shared camaraderie abounded. The next gathering is being planned for March 2022.

General Convention 2018 referred resolution 2018-D021 to the Board. While the mandate was not met, the Office for Transition Ministry (OTM) reported in January 2021 that it is implementing resolutions 2018-D021 and 2018-D064. 2018-D021 requires that sex and current annual compensation no longer appear on an Individual OTM Portfolio, and that a specific range of compensation be required for Community OTM Portfolios posted by dioceses. 2018-D064 requires that a copy of an Accord or Order for deacons, priests, and bishops be attached to an Individual OTM Portfolio. This resolution also requires that each diocese notify the Office for Transition Ministry of such Accords or Orders.

The OTM database and portfolio forms were not updated or altered during this triennium, despite urging from the Board.

Specific Mandate from GC79

Resolution 2018 – D021 – Revise Ministry Portfolio Form for the Transition Ministry Office

Resolved, That on the Basic Information portion of the Ministry Portfolio maintained by the Officer of Transition Ministry for a member of the clergy, the section titled Sex be deleted; and be it further

Resolved, That on the Compensation & Housing portion of the Ministry Portfolio maintained by the Officer of Transition Ministry for a member of the clergy, the Current Annual Compensation section be deleted; and be it further

Resolved, That a specific amount or range of compensation be required on each Community Ministry Portfolio published by the Office of Transition Ministry; and be it further

Resolved, That these changes be made and take effect no later than December 31, 2018 and that they apply to all postings and information maintained by the Officer of Transition Ministry as of that date.

BOARD OF THE ARCHIVES OF THE EPISCOPAL CHURCH

Membership

Ms. Pan Adams-McCaslin, <i>Convener</i>	Western North Carolina, IV	2021
Ms. Anne Bardol	Northwestern Pennsylvania, III	2021
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2024
Dr. Heather Calloway	Indianapolis, V	2024
The Rt. Rev. R. William Franklin	Western New York, II	2021
Dr. Frederick Gerbracht	Long Island, II	2021
Prof. Lawrence Hitt, II	Colorado, VI	2024
The Rev. W. Keith McCoy	New Jersey, II	2024
The Rev. Dr. Robert Pace	The Episcopal Church in North Texas, VII	2021
Ms. Margaret Porter	New Hampshire, I	2024
The Rt. Rev. Samuel Rodman	North Carolina, IV	2021
The Rev. Dr. Brian Kurt Wilbert	Ohio, V	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
Mr. Mark Duffy, <i>Ex Officio</i>	Texas, VII	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

There were no changes in membership during the past triennium.

Representation at General Convention

The entire Board of the Archives were present at the 2018 General Convention meeting in Austin Texas as either deputies, alternate deputies or members of the House of Bishops.

Acknowledgements

The Rev. Canon Lang Lowrey, III; The Rev. Canon Michael Barlowe; The Rev. Deacon Geoffrey T. Smith

Mandate

Canon I.5.3

Sec. 3

a. There shall be a Board of the Archives which shall consist of the Archivist (ex officio, with vote) and twelve (12) appointed persons, three (3) of whom shall be Bishops, three (3) of whom shall be Clergy, and six (6) of whom shall be Lay Persons. All appointed Members of the Board shall serve terms beginning with the close of the General Convention at which their appointments are confirmed and ending with the close of the second regular Convention thereafter.

b. Members shall serve rotating terms for the purpose of continuity on the Board. In the first instance following the adoption of these provisions, one of the Bishops and one half of the Clerical and Lay Appointees shall have terms expiring after the next regular meeting of the General Convention as determined by lot.

c. Bishops shall be appointed by the Presiding Bishop, and other Clerical and all Lay Members shall be appointed by the President of the House of Deputies, all subject to the confirmation of General Convention. Consideration shall be given to assure that membership includes persons who possess knowledge either of history or archival administration, or are persons skilled in disciplines pertinent to the resolutions of the concerns of the Archives. Positions of Members of the Board which become vacant prior to the normal expiration of such Members' terms shall be filled by appointment by the Presiding Bishop or by the President of the House of Deputies, as appropriate. Such appointments shall be for the remaining unexpired portion of such Members' terms, and if a regular meeting of the General Convention intervenes, appointments for terms extending beyond such meeting shall be subject to confirmation of the General Convention. Because of the special skills and knowledge needed by this Board, a Member shall be eligible for appointment for two successive terms, after which the Member may not be reappointed prior to the next meeting of the General Convention following the meeting at the close of which the second successive term of the Member expired. Members appointed to fill vacancies in unexpired terms shall not thereby be disqualified from appointment to two full terms immediately thereafter.

d. The Board of the Archives shall have the duty to set policy for the Archives, to elect the Archivist of the Episcopal Church, and to set forth the terms and conditions with regard to the work of the Archivist.

e. The Board of the Archives shall meet annually, or more often as required.

f. The Board of the Archives shall elect its own officers and have the power to create committees necessary for the carrying on of its work.

g. The Board of the Archives shall adopt procedures consistent with the Constitution and Canons of the Episcopal Church for its organization and functioning.

h. The Board of the Archives shall report to the General Convention, and the Executive Council, through the office of the Executive Officer of the General Convention, and to the Church.

Sec. 4. There shall be an Archivist of the Episcopal Church whose duty shall be to manage the Archives, records, and related information resources of the Church at the direction of the Board.

Sec. 5. The expenses of the Archives of the Episcopal Church shall be shared by the General Convention and the Executive Council.

Summary of Work

A Narrative of Accomplishment

To close out the past with an accounting of where we have been, what we have learned, and where we are going—the future into which God is already calling us, we offer the following narrative history from 2018-2020 and indeed, as the enclosed time line shows, a bit of history before that.

The Board met seven times in the triennium: once in person, due to the COVID-19 pandemic, and six times by teleconference. The Executive Committee (comprising the three officers, Board member at large Larry Hitt, and the Archivist) conferred as a body of advice to the executive Director a total of 22 times in teleconference. Meetings leading to decisions were kept in minutes. The Chair communicated regularly with the Canonical Archivist to provide counsel, coordinated his annual performance review, and assisted in weighing priorities in light of the many demands of securing a new facility for the Archives and maintaining operations.

In the months following General Convention of 2018, the Board and DFMS management agreed that it would be in the best interest of The Episcopal Church and the Archives to sell the property known as Block 87 in downtown Austin, which had proven to be a low-risk, high-return investment in a prominent location in the hope that the entire archival holdings could be gathered under one roof. In early December of that year, the Canonical Archivist, supported by the Executive Committee of the Board, sent the Presiding Bishop a status report and action plan with recommendation for next steps

in locating the archives beyond Block 87. On December 31st the Office of Public Affairs released a statement on the sale of the Austin property which declared “Proceeds from sale to accelerate new Archives.”

In a January 2019 response, the Presiding Bishop indicated the need for a pause: “This transaction is a positive development broadening the church’s opportunities and creating new possibilities for addressing the archival needs of the church.” The moment for reflection was accompanied by a request that the Board pause its work and prepare a vision statement of its mission and ministry of the Archives with general specifications for a future archive. The Archivist and Board were informed of an unprecedented judgment that all previous actions of the General Convention and the Executive Council regarding a new archives building were effectively null and void.

It bears noting for the record that the sale of Block 87, after all debt, taxes, and development costs related specifically to Block 87 were paid off, realized for the DFMS a cash gain of approximately \$23 million from an investment that required no cash outlay or collateralized loan costs to the Society. The administration ceased all planning activities, including the capital fund raising effort, which was shelved amidst a leadership change in the 815 development unit. Proceeds of the sale were placed in Executive Council discretionary trust funds without reference to either their source in a designated asset for the Archives, or reference to the original intention of the past Councils.

When the Board met in Austin in February 2019, it endeavored to answer the question posed by the Presiding Bishop: “What are the physical and digital archival, and information management, needs of the Church in the early years of 21st century that the Episcopal Archives must address?” What follows is the statement crafted by the Board after its three-day February 2019 meeting, revised in the months which followed, and presented to the Executive Council’s Governance and Operations Standing Committee in June 2019 in video conference.

Archives Board’s Vision and Priorities for the Episcopal Church’s Archives

May 29, 2019

Keeping Archives, Keeping Faith

“Pay attention, my people, to my instruction! Listen to the words I speak! I will sing a song that imparts wisdom; I will make insightful observations about the past. What we have heard and learned that which our ancestors have told us - we will not hide from their descendants. We will tell the next generation about the Lord’s praiseworthy acts, about his strength and the amazing things he has done.” (Psalm 78:1-4 New English Trans.

Introduction

In response to a request by Presiding Bishop Curry and President Jennings, the Board of Archives at its recent meeting in Austin discussed at length the value and future needs of The Archives of the Episcopal Church. The Board devoted its full meeting in February to the topic of keeping archives – physically and digitally, and bringing new members into a conversation that has been underway for well over a decade. Members reviewed the journey and the lessons, the ideals and the compromises generated by a project of this magnitude, and broke into sub-groups to study what we identified as the priority concerns. Our task was not to dive into the vast details already examined to produce another list of specific requirements. We tried to think large of our shared mission. This report is the product of the groups' thinking refined into a succinct statement of need.

We focused our thoughts around three important areas: the theology of historical stewardship of archives, the practical needs and priorities, and a means of communicating these needs to the Church. The Board felt a certain level of urgency in giving advantage to the commendable outcome realized by the sale of block 87 in Austin. The concept we all aimed for in 2009 fell short of the ideal, but it brought the Church a gift of funds that opens new opportunities, which though modest in comparison, can still achieve the Project's essential goals.

The Archives of the Episcopal Church contains collections of both written and digital records of the story of the Episcopal Church. These records are fundamental to our identity and are a key to determining our future mission, particularly as we enlarge the rich narrative of the Episcopal Church beyond the self-imposed boundaries of the majority culture. Mission requires that we know the story of the voices that have been left out. The Board is excited that at this moment of invigorated mission the Archives can be equipped to respond more fully to the call of the Jesus Movement to become a beloved community. A space that supports various modes of accessibility will give all members a connection to the Church's story and allows us to more honestly address issues of racial healing, evangelism and creation care.

A Theological Understanding

Our Episcopal Church is a denomination which locates itself around the centrality of the printed word. Our historical records are part of a revered account of God's acting within our branch of the Body of Christ. At the same time, the Body of Christ is also a flawed human institution that carries its past into every occasion. Just as Moses urged the ancient Hebrew people to choose to remember their past lest they forget, Episcopalians need the records of our history to be safely preserved for access so that they may guide us as we continue to adapt to new ways to serve and know God, and with new insights.

The Gospel states that “The Word dwelt among us.” Our Anglican heritage has always been dedicated to making the Word accessible to the whole people of God: the Bible in the language of the people, the liturgy in the language of the people. When we are discussing the idea of the “Word” dwelling within the annals of the Church’s archives, the Board contemplates the value of having the collections safeguarded, catalogued, digitalized, exhibited, and cared for.

Archives as a Place for Evangelism and Mission

Board members are keenly aware that the Archives, in its mission support role, must venture forward strategically to communicate a message that feeds the healing work of the Church. The Archives reminds us that this work is a constant and renewable source to refresh our Episcopal DNA. Each year the Archives responds to close to a thousand inquires of historical, legal and general consultations, most of which are researched for a wider conversation. General Convention alone accounts for 534 inquiries, but adult study, student projects, parish anniversaries, and academic histories are all part of the conversation about The Episcopal Church’s real world engagement. The Archives’ Digital Archives and Web exhibits, which focus on the history of marginalized communities, reach over 200,000 unique users annually. The work of the Archives is the work of evangelism, which is the main work of the Church. The Archives work is the collaborative work of staff, primary resources, donors, users, and technologies.

It requires not just a storage solution but a ministry-centered design.

Over the last 20 years, visioning and planning for a future home for the Archives and its many collections has been a primary focus for the Board, the Executive Council, and General Convention. Currently housed on the 2nd floor of the library of the Seminary of the Southwest in Austin, Texas, with five off-site storage sites, the Archives has greatly outgrown its space. Over the last several triennia, numerous committees of Executive Council have reviewed the unique value of the Archives for the future not only in the collections held by the Church, but the opportunities for internal Church research, education, and a place to have affordable, reasonable access to the records, both physically and digitally. Why does the Board find urgency in locating the Archives?

- The space we rent from the Seminary is over 60 years old. They have requested the space be vacated for seminary expansion.
- The building does not meet archival, environmental, and industry storage standards, affecting the stability of the materials and their preservation.
- Every staff member’s office and most work areas are double-purposed.

- Current research space accommodates only 2 visiting researchers at a time.
- Collections and documents are held in five other storage facilities, requiring expensive retrieval fees and wait times.

Priorities in Meeting Strategic Needs

What are the strategic and practical needs for The Archives of the Episcopal Church?

- A well-designed, safe facility for the collections and the staff.
- A site providing appropriate environmental controls, fire suppression, ADA compliance, structural integrity, and workplace efficiency in a location not prone to natural disaster.
- Research and visitor accommodation with public display areas.
- A state-of-the-art facility that meets the archival needs for advanced information technology, digital archiving, and networking, with the capacity to accommodate changing technology
- Site selection that will be attractive in hiring and retaining quality staff. Aspects of this element include housing affordability and proximity to a college or university with a library or archival training program capable of being a contributing environment for work/study, part-time, and full-time staffing needs and staff professional development.
- Appropriate work space for staff, including standard archival processes of acquisition, lab and bench work, appraisal, organization, digitization, preservation, and special project implementations
- A site that is identifiable as The Archives of the Episcopal Church, which provides a welcoming, hospitable place for visitors/researchers with proximity to a commercial airport or public transportation to maximize access to the entire church.

Setting Direction Anew: What are the next steps?

The sale of the land in Austin and the realization of approximately \$20 million in new money is cause for celebration and a happy accomplishment after immense efforts expended by the Archives Board and the Executive Council. We have learned much about the range of possibilities by utilizing staff, consultants, architects, and other experts.

Executive Council and General Convention have continued to commit to the Archives Project and its importance during the last twenty years. Monies were set aside for the projected multiple moves to a new site and for endowment fund development to maintain an archival environment. These are

necessary expenses that, together with the building, give us reason to examine carefully the scale and program of the future Archives. The Board of the Archives believes that attention to these practical and urgent needs of the Archives at this time in the life of the Church will faithfully make the story of God's deeds known to our descendants "so that the next generations, children yet to be born, might know about them." (Psalm 78:5B-6a)

The Board of the Archives submits its recommendation to the Executive Council that it charge the Board, the staff, and other leadership of the church to undertake this important opportunity to work together to pursue an expedited development of the Archives while being attentive to the concerns of future sustainability, stewardship of resources, and mission priorities of the Church.

Background: The Archives of the Episcopal Church – Timeline

Over the past 184 years, the Domestic and Foreign Missionary Society (DFMS) has consistently affirmed and demonstrated a commitment to collecting, preserving, and communicating its history—by church canon, Executive Council action, and triennial budgets of General Convention. The Episcopal Church has long envisioned a suitable permanent repository for its ever-growing archive of material—manuscript, print, digital, photographic, video, and film. With each passing year and every acquisition, the need for a more accessible, spacious, staff- and user-friendly facility becomes more evident and urgent.

1835 The Episcopal Church signifies the importance of preserving its history by naming a conservator of archives.

1930 General Convention archives deposited at the New York Historical Society.

1940 Church Historical Society places additional archives at the Philadelphia Divinity School.

1959 Archive collections are combined and delivered to the Seminary of the Southwest, Austin, Texas, an archivist is employed, and a professional program of archives acquisition, processing, and reference service develops.

1985 General Convention enacts Canon I.5.3, establishing an oversight board for the Archives, further committing the Church to the care of its institutional history.

1996 The Archives Board requests a program assessment study for a modern archival facility.

2006 Expanded holdings are housed in four separate locations. Executive Council acts on Board's request to move forward with proposal. A Building Committee begins a three-year intensive study to determine optimal Archives site and location options.

2009 DFMS/Executive Council purchases Austin Block 87 property for \$9.5 million after identifying over 16 potential sites and 4 finalist locations, with intent to construct a suitable repository for the Archives in their entirety.

2015 Executive Council gives permission to sell Block 87, at that time valued at \$17 million.

2016 Executive Council renews support for the building project, allocating a reserve budget of \$3.3 million for moving and development. Archives project is designated as a priority. Development Office and Archives re-frames case statement and campaign materials.

2017 A developer is chosen for Block 87 property development, to include space for the Archives and an adjoining mixed-use project. Archivist and DFMS Development Director begin early silent fundraising, and initial major ask is pitched.

2018 In the Blue Book report to the General Convention at the conclusion of the Triennium, the Canonical Archivist states in 2017, “We expect to find fruition in 2018 with the start of construction on a new and permanent facility for the Archives.” Block 87 increased value has provided 18% year over year ROI. DFMS Development Director retires. On 31 December, TEC announces the sale of Block 87 in its entirety, resulting in cash profit in excess of \$20 million after all expenses, taxes and settlement costs.

2019 February 7-9, the Board of the Archives of TEC, the Canonical Archivist, DFMS executive staff, and Archives staff gather in Austin for a three day visioning process, with evaluation of current and future preservation, storage, and accessibility needs, for presentation at Executive Council’s June meeting.

[End of June statement to Council]

Working with Contingency

Although the June 2019 report from the Board of Archives to the Executive Council was well received, communication about the future of the Archives relocation to the Canonical Archivist and the Board was minimal between June and December 2019. Very preliminary conversations of other possibilities were underway among DFMS management and these would require time to explore. At the Board’s meeting on January 16, 2020, DFMS Chief Operating Officer Geoff Smith described his initiative to reach out to contacts at Iron Mountain, a records warehousing company, in order to arrange interviews with the Archivist for an assessment of a possible “turn-key” contingency for the

Archives. The Canonical Archivist and the Board voiced objection and concern about this type of contingency planning and sought clarification of this nonstandard option for operating a historical archives.

Following the Board meeting, COO Smith asked Board vice-chair Bishop William Franklin, Board member Ted Gerbracht, and Treasurer Kurt Barnes to meet on March 3rd to discuss the Archives building project. The parties agreed to recognize that (1) the Archives project had been supported by successive Executive Councils as a priority of The Episcopal Church and that the Board's recent vision statement serves as the operative document for any alternative to future housing for the archives; and (2) the complexity of the canonical oversight of the Archives and Archivist was acknowledged. Throughout the triennium, these issues continue to be addressed for the impact they have on trust in the relationship among Archives staff, the Leadership Team, and the Archives Board.

At the turn of the page from the calendar year 2019 to 2020 no one was aware of the impact which the COVID-19 coronavirus, racial unrest, and a vitriolic election cycle were about to unleash, in a way that we would soon exhort us to "live and move and have our being." The Board's Executive Committee learned in the summer of 2020 that COO Smith had presented a proposal from Iron Mountain to an Executive Council committee in June for consideration. A July 9 response from Executive Council's Executive Committee to COO Smith requested that a broader search be made for competing options. While the resolution did not call for their participation, the Canonical Archivist diligently responded to assist COO Smith in identifying reasonable alternatives and, working with finance and property consultant Lang Lowrey, to identify archival options other than an outsourced storage solution.

The relocation contingency received heightened urgency by the firm confirmation in late July that the Seminary of the Southwest was on target with its renovations plans and requested that the DFMS relocate the Archives by May 2021. Due to the immediacy of the interim move, the Archives staff would almost immediately need to begin closing down projects in progress and packing up the holdings at the Seminary. The Board's September 2020 meeting was laden with questions about the rationale for a temporary move of the entire collection, the full accounting of the funds obtained as a result of the Archives project at Block 87, the paucity of communication and collaboration between the DFMS leadership team, the Board and the Archivist. Trust became a central issue between the Board and the DFMS leadership, prompting Board member Bishop Jennifer Baskerville-Burrows to propose a resolution to Executive Council. While commending the continued search for a permanent site for the Archives, it advised that "discussions related to the interim and permanent housing for the Archives involve members of the Board of Archives and the Canonical Archivist; and. . .that any

conversations with potential partners from concept to completion include the Chair of the Board of Archives.”

Smith led a presentation of the ad hoc working group’s findings to the October 2020 Council meeting with Board Chair Pan Adams-McCaslin, Canonical Archivist Mark Duffy, and Consultant Lang Lowrey. Four options were ranked from the cheaper commercial storage company’s proposal, to a warehouse facility in need of renovation, to an attractive modified but smaller space, and finally to a large lease to purchase space that would require a robust and whole hearted staff response to accomplish. The Archivist’s lead recommendation was the latter site for its investment value, longer term suitability at a time of uncertainty, and least risky for its agility of future choice. The Executive Council chose renovation of the warehouse option for its short-term cost advantages. As of this writing, the archivists are preparing to close the Archives and begin the task of preparing the Seminary library holdings for an accelerated move to a site on Denson Drive in Austin from their last temporary home of 60 years at the Seminary’s library building. While the holdings will still be split across locations, the hope is that they will be less so with an improved floor plan.

Conclusion

This three-year report reflects a period of intense Board activity to match a series of decisions, actions, and sometimes opaque negotiations surrounding the future of the Church’s archives. It began with what was clearly a financial accomplishment unmatched in the DFMS’s history: the sale of the downtown Austin property. The property had been held as an income-generating investment for 10 years in the earnest expectation of either a building for the archives on the site, or a windfall profit for the DFMS that would be more than sufficient to complete the Archives Project. It was our hope that these monies would also be used for endowment purposes to feed and care for a new Archives thereby lessening the impact on the General Convention’s budget. This remains the collective hope of the current Board.

Yet at the end of the reporting period of the triennium, the Fall of 2020, The Executive Council has endorsed a move for the Archives to a renovated warehouse in what is expected to be a five-year interim stay as the DFMS leadership pursues alternate plans for a future home of the archival holdings.

The future home and the continuing mission and ministry of the Archives of the Episcopal Church also remains the collective hope of the current Board.

The membership of the Board of Archives, appointed by Church leadership, is comprised of historians, archivists, and other professionals who have brought their gifts, experience, and

appreciation for history and for our Church Archives to this work. Our ministry, in the words of a song written by Anne and John Barbour, is to be “Guardians of Time.” We join with the Canonical Archivist and his staff who are also “guardians of time” in the evolving story of the Episcopal branch of the Jesus movement. The Board offers their sincere appreciation to the Canonical Archivist and the entire curatorial and professional staff for their dedication in a time of great upheaval and uncertainty. Many of them had other employment choices offered to them but have stayed committed to the work of the Archives. We shared with them the expressed hope that this important decision about the Archives’ care and protection would eventually filter through a fresh constancy and understanding of the historical record’s importance—symbolically and evidentially—to the Church’s institutional future.

In his attached report, Canonical Archivist Mark Duffy will continue the thread begun at the beginning of this report—where we need to go in the frontiers of e-archives, greater online access to our past, electronic document deposit and exchange with diocesan leaders and protection of corporate historical data in a time of heightened concern with security and privacy. The Board acknowledges that the primary work of the Archives must be allowed to thrive without unnecessary hindrance, if the Church is to realize the benefits only recently accrued since the General Convention took direct responsibility for its archives and history in 1985.

The Rev. Dr. Brian K. Wilbert

Secretary of the Board

Submitted on behalf of the Board of the Archives of the Episcopal Church

REPORT OF THE CANONICAL ARCHIVIST

The Archives has maintained a steady progress in its main areas of historical documentation, education for mission, and evangelism in the three-year period from 2018 to 2020. The historical project has proceeded against a background of an unpredictable and competing social discourse questioning the reliability of shared knowledge. Its analogous expression is found in the public and church-wide reckoning with individual story telling of personal journeys. The dynamic is thought provoking. Stories as personal experience have achieved an elevated authority capable of influencing the public narrative. They emerge to awaken in others the threads of shared value and empathy, even when the experience is unfamiliar or foreign. Story contrasts with history, which is acquired by the conveyance of the collective memory, however contested that may be at any moment. History exists as an external refereed truth that challenges us to reframe our personal story in ways that are anchored in the greater community experience.

Properly set aside and safeguarded, archives are the touchstone sources for the shared story. They supply lasting influence on the reframing rituals that living institutions practice in the course of reevaluation and affirmation. The idea was proposed at a Board meeting early in the triennium that the future of archives is uncharted and the “meaning of archives” has been altered in some fundamental way by technology. Technology has certainly expanded the possibilities of archiving and added a layer of complexity requiring greater expertise. The essential meaning of archives as enduring documentation has not changed, however, for the historians and archivists who work to preserve primary sources and reframe events for the benefit of institutions and society.

For the Church, technology has left many of our dioceses and parishes in a far more tenuous state of concern about having the tools and expertise to manage their electronic archives in networked and cloud-hosted computing environments. As a central agency of The Episcopal Church, the Archives has a duty to develop intra-Church information systems. The elements of that kind of support and of a thriving church archives are immutable: place (a building), tools (information and technology), and experience (professionalism). Care in cultivating these defining elements will safeguard our stories and history for whatever providential future lies ahead.

Research Services

Support of the General Convention bodies, the DFMS, dioceses and our official organizations remains the core of our research services as measured by time and output. The value of the internal organizational research appears to be highly appreciated as there is a steady flow of inquirers asking not simply for fact checking but also for the in-depth historical analysis and reporting, a service

developed only in the last dozen years. Like so many services that are reliably performed, what was new just a decade ago is now the norm.

For the three-year reporting cycle that covers the period 2018 to 2020, the archivists responded to a total of 1,820 research queries that involved intensive historical research of several hours or days to complete (about 25% of which were General Convention bodies). The Records Management office responded to 163 research inquiries for Episcopal Church Center staff, which concerned more current research. Consultations to dioceses, parishes, and agencies on archiving, digital records, retention, copyright, and similar matters accounted for 334 incoming questions. Overall then, the staff responded to 2,321 requests for assistance from the Church community in the three-year period.

Institutional Research. The greatest amount of staff time is assigned to priority research of internal governance, administration, legal, and mission program inquiries. Interim governance requests involve considerable original research, digitization, and personal consulting. Although they amount to just 25% of the requests, they account for about 75% of the time. Internal requests typically result in a formal Archives Research Report. Archivists prepared 58 historical research products for internal bodies in the three-year reporting period. These research reports do not include, however, the separate categories of on-going legal support in areas of clergy discipline, property, litigation, trust fund terms, and copyright, nor the 467 research reports prepared for the legislative committees and individual bishops and deputies leading up to the last General Convention.

The following partial list illustrates the range of administrative and mission-related topics researched in depth for internal programs and governance.

- Admission of the dioceses of Haiti, Puerto Rico, Venezuela, and Hawaii
- Advocacy by TEC for refugees, criminal justice, and Israel-Palestine justice
- Analysis and compilation of Church's insurance coverage
- Anti-racism efforts by the institutional governing bodies of The Episcopal Church
- Associational history of The Episcopal Church and the Boy Scouts of America
- Church Pension Fund and its historical relationship with General Convention
- Church-wide strategic planning efforts by The Episcopal Church
- Coalition 14's origins, members, and grant programs
- Committee on Social Criteria for socially responsible investment: origins and history
- Copyrights/service marks of The Episcopal Church: history and status
- Creation, requirements, and evolution of the office of Licensed Lay Evangelist
- Cuban property owned by the DFMS in Cuba at the time of the revolution
- Direct Ordination Efforts in The Episcopal Church
- The Episcopal Church's position and reactions to the U.S. Civil War

- Evil and social justice as theological problems in the Baptismal rite revisions of 1979
- Evolution of roles and compensation of the presiding officers of General Convention
- Freedom of religion and separation of church and state
- General Theological Seminary and its relationship to the General Convention/DFMS
- Influenza Pandemic of 1918 and a web microsite history
- Development and requirements of parochial and diocesan reports
- Relationship, autonomy, and financial covenants of the ECW and UTO Committee
- Review of Decade of Evangelism and previous evangelism campaigns and projects
- Slavery reparations and The Episcopal Church's response to the issue
- Socially Responsible Investing and the Church Pension Fund
- Task Force on Older Adult Ministries: background of the ministry to seniors
- Affiliation evidence of Emmanuel Parish, Geneva, to The Episcopal Church
- Primary sources for historical research on Asian American Episcopal history
- Translation service, practice, and policies of The Episcopal Church
- The United Nations and the history of support by The Episcopal Church
- White supremacy in TEC: primary sources for confronting instances and stories

By far the most extensive research and reporting task in the triennium was the report requested by 2018-A088 to recommend to the local church Guidelines for Policy on Amending Church Records for Name and Gender Changes. The report was vetted with affected communities and submitted to Executive Council, which approved the guidelines for distribution at its October 9-12, 2020 meeting.

Website Research. The Digital Archives (ranging from 35–45% of current web use) is the main vehicle for reaching the Archives' user community for education, advocacy on public issues, Church-wide policy, and governance. Advice on records and archives and historical resources accounted for 26-37% of the total use depending on the year of the triennial cycle. Unique visitors to the site also reflected the Churches triennial activity: 198,733 (2018); 124,872 (2019); and 132,385 (2020). Page requests averaged 662,728 over the three years. (688,446 628,471 671,267). Information provided below describes new resources offered on the episcopalarchives.org site.

External Research and Outreach. Most external research has been diverted to online sources. Archivists still provide research assistance and document delivery to a variety of students of church history when this can be done efficiently. This minimizes costs as on-site historical research makes extensive use of the holdings and includes lengthy occupancy of the Reading Room and dedicated attention of staff.

Among the external research use were writers of diocesan histories, and historians examining the history of the American Council for St. Luke's International Hospital, the Fund for the Diaconate, the

General Board of Examining Chaplains, Japanese missionary Mary Buchanan McGill, the introduction of trial liturgies in 1979, the development of global Christian networks, the Historical Society of the Episcopal Church, the Alaska Missionary Field, Prayer Book revision, Alaska missionary and physician Dr. Grafton Burke, Bishop James Theodore Holly and Haitian history, the Good Friday Offering, a documentary of the Philadelphia Eleven; the evolution of *El Libro de Oración Común*; a forthcoming book on social activism in the post-war Episcopal Church; Norman Binsted and wartime internment in Philippines; and religious influences during the Japanese American WWII interments.

The Archives hosted four exhibits for local events: an exhibit booth at General Convention, two separate exhibits on women's ministry, and an installation with the Seminary library on Jonathan Daniels. The latter exhibit was curated with the assistance of student intern Nobel Brigham from Episcopal Academy in Newtown Square, PA.

Digital Archives

In creating preservation copies of historical records, archivists try to meet the needs of institutional users, seekers in parishes and advocacy networks, and public users by selecting primary sources with the greatest continuing value in areas of governance, mission, and education. The curators are dedicated to high quality control when authenticating published records as the Digital Archives are used as trusted surrogates for the original records in formulating contemporary reinterpretations. Digital projects for the reporting period were delayed in 2020 by the closure due to the pandemic, but many projects were completed nonetheless as the list that follows attests.

As the Digital Archives expands in time, the Church audience has expectations of regular updates and expanded access to more online resources. Electronic conversion of original documents requires close preparation and periodic maintenance, especially if reliability and web persistence are valued. Technical complexity comes when data arrives in the Archives of obsolete software systems. In these cases, archivists must develop new technology platforms and refresh data to ensure future accessibility. During this triennium, the Archives fully maximized its staffing resources to manage an active digital presence. Unrestored staff reductions that occurred just as digital information systems became the norm in 2009 set a limit of sustainable activity for the Archives program. Meeting the demand for digital information will be a challenge, however, in the next two triennia without compromising the quality of these and other services.

Episcopal News Service. Archivists took steps to expand the popular Episcopal Press and News digital archive by incorporating 4,567 articles (23.4 GB) published from 2006 to 2011. Archivists moved data from stored obsolete files on a defunct ECC web content management system and placed that data into an open source searchable database. The news releases were checked for de-

duplication, repair of missing text, false links, and formatting issues. Unfortunately, the associated images, videos, and captions were ill-advisedly separated from the stories when the old ECC web-based system was abandoned in 2012. The Archives has prepared a script to reunite the images and videos with captions and credits, which will require close work to validate against the correct story. Other future work will harvest news releases for the years 2012 to 2019 from the current ECC web management system into the Digital Archives.

The Acts of Convention, 1973–2018. Additions were made to the Acts of Convention database in the past three years. The 2018 resolutions were added in late 2019 due to the extended publication delay of the official Journal minutes. During the novel coronavirus pandemic, the staff reclaimed several tasks from the shelf of future work to address missing citations, inconsistent text formatting, and retrospective topic indexing. Notably, archivists extended the Acts database back one session to 1973 from 1976.

Reports to General Convention from Official Bodies. Archivists completed data processing and publication of the 2018 interim body reports (the “Blue Book”) to the Digital Archives, adding 51 reports. This update extended the existing digital record, which begins in 1976 and runs through the current triennium. A new indexing scheme and interface that simplifies the topical search was developed and will be implemented on the website in early 2021.

Resolves of Council. The Resolves of Council digital archive has been updated in the triennium. Staff compiled and coded data for resolutions of 2017–2019. These were added to the database with descriptive titles and indexing. They are scheduled for posting on the website in January 2021. The curators used the pandemic-related remote work situation to review the existing database (1976–2019) to identify endorsed documents of Executive Council for inclusion at a future opportunity.

The Witness Magazine. The most exciting new initiative of the triennium for the Digital Archives platform is The Witness magazine, the news journal of record for social justice ministry and advocacy in the Episcopal Church. The Archives negotiated acquisition of the historical records along with the copyrights when the Church Publishing Company closed in 2009. By the end of 2020, the archivists had scanned to preservation standards a complete set of the issues, (2,849 issues of 50,018 pages) for 1917–2003. As with so many of the delayed applications during this time of the pandemic, uploading The Witness to the Archives website will be an early 2021 task that awaits design of a search interface.

Alaska Mission Photographic Preservation. The Archives completed a pilot project and follow-up digitization of its extensive photographic archive on the Alaska Mission. These images were used to

publicize information about the outposts and raise funds for churches, hospitals, schools, and other basic social infrastructure. The photos have high historical and anthropological value for their depiction of indigenous tribes, families, traditional domestic and work life, community infrastructure, industry, and transportation. The photo archive will be completed as a project in early 2021 and published shortly thereafter to the Archives website.

Jonathan Daniels Oral Histories / EDS Archives. This preservation project was completed in tandem with an exhibit at the Seminary of the Southwest. Archivists digitized a large collection of remembrances and eyewitness accounts of Daniels' life, short ministry, and murder in Lowndes County, Georgia. The archive holds 159 recordings (595 GB) of interviews conducted by Charles Eagle from 1985–2003.

The Spirit of Mission. The Archives digitized 25 volumes across date ranges of 1859–1938 of the Episcopal Church's premier mission news publication *The Spirit of Mission*. The volumes are the last of the issues still under copyright and include issues missing from existing online publications.

Women in Ministry: the Woman's Auxiliary. Working with a generous grant from the United Thank Offering, archivists began preservation digitization in 2020 of the Triennial Minutes of the Woman's Auxiliary, the Triennial Minutes of the Executive Board of the Woman's Auxiliary, Journals of the Diocesan chapters of the Woman's Auxiliary, and miscellaneous reports and publications. This is the first of three tranches of primary source material dating from 1880 that will be preserved and made available for wider access.

Acquisition and Preservation of Born Digital Records

This triennium marks a major point of accomplishment for the Archives in completing and implementing its Digital Repository system for acquiring digital data. Archivists began bringing electronic records into the repository after completing two years of data analysis, system configuration, standards development, and testing. The curators developed fresh appraisal and accessioning standards for evaluating new electronic records (i.e. "born digital") files.

In 2019, stored digitized data was systematically migrated from hard drives to the preservation environment with full metadata treatment, normalization, and audit control. Given the 35 TB of backlogged data, the process of careful intake and audit review has been slow. Approximately 10 TB of data were prepared for intake into the repository in 2020 just before the remote working situation of the pandemic, which interrupted the workflow. Archivists continued to ingest records remotely and have prepared the remaining 25 TB for intake by early 2021.

The Records Management Archivist and the Digital Archivist have been especially conscientious in keeping tight quality control over the development of the Digital Repository to prevent future confusion or data complexity. In conjunction with two software upgrades, the Archives moved the application to Arkivum’s dedicated cloud account, releasing it from dependency on the physical servers at our office location. The combination of the ECC IT ofce’s withholding of technology in December 2019 and the sudden threat of an unplanned removal from the Archives of data servers—and the historical records that reside on them—caused substantial delays and lost productivity. The work of the Archives in this area continues to follow the highest professional standards. The custodial duty is to protect the evidential and historical value of the records from unauthorized access or manipulation and to keep secure the systems that hold and manage the data.

General Convention Interim Body Database (Extranet). The Archives labored throughout the three-year period to obtain a clean capture of the 2009-2015 governance data from the proprietary content management application called the “Extranet” and place it in an open-source database. The Records Manager completed a detailed appraisal report of the Extranet database structure, function, and content for the years 2009–2015. Working with the Director, a retention schedule was completed and delivered to the General Convention Office in July 2020 with retention and deletion recommendations. Provisions were made for removing or sequestering sensitive personal identifying information. Public documents were identified for a future public access interface with the repository. This work is ongoing and hangs exclusively on decisions made by the GCO as they evolve systems of data management.

Episcopal Migration Ministries Database Acquisition. Archivists gave significant unanticipated attention in the triennium to securing the refugee data held jointly by a resettlement consortium but stored and managed by a Lutheran Church IT unit. Political realities surrounding US refugee policy prompted the Archives to move forward with capture of a security copy of the cloud-based database that holds vital information on families and individuals who arrived with little or no permanent documentation. The Archives prepared a database container to receive and secure the refugee data outside the contractor's cloud account. This work was much interrupted by the coronavirus pandemic in 2020, but at the time of this report, archivists and consultants had settled on acquiring a year-end archival snapshot of the data base in early 2021.

Records Management and Data Retention

Archivists supported the work of DFMS staff by responding to regular requests for assessment of current records, retention decisions, organization of computer files, and consultation to create good record keeping systems. The Records Manager conducted 1,044 office consults, records assessments, and other supporting information management with DFMS staff in the three-year

period. At least a third of these contacts in any year involve extended consultations, including orientations of new staff and hand-off interviews with those leaving employment. The individualized attention gives DFMS employees a greater awareness of their record-keeping responsibilities and a measurably greater commitment. The archivist regularly maintained current content for the online document resource (ERIC), including a special section related to the COVID-19 pandemic with policies, office procedures, and remote working guidelines.

Acquisitions and Access

Historical records acquisition for the period 2018 to 2020 amounted to approximately 775 cubic feet of analog and paper records and 5.2 TB of new digital data. The Archives ceased soliciting historical records from non-DFMS entities in 2020 in view of the uncertainties of the pandemic closing and the future of the Archives' building accommodations. The intake of paper records were unusually augmented by the acquisition of the Episcopal Divinity School archives in 2018. On the whole, however, the quantity of digital records continues to accelerate as the amount of analog records declines. This same trend is reflected in the records received by the Records Management Office at the headquarters between 2018-2020, which totaled 316 cubic feet of analog records and 5.2 TB. An additional 4 TB of stored legacy data were discovered and set apart for assessment. The amount of paper records has declined by 200% over the last six years, but the impact of COVID on financial record keeping in 2020 will greatly accelerate this transition to digital record keeping.

Between 2018 and 2020, archivists conducted archival appraisal, processing, and description that resulted in the creation of 19 formal descriptive finding aids, which represent 229 cubic feet of fully processed records. In addition, Archivists prepared scaled-down inventories that opened access to more than 535 cubic feet of archival records. The following is a partial list of fully processed (*) and minimally processed records that also largely reflect acquisitions of the past three years.

- Papers of William White, 1643, 1764-1855 and the White Family, 1807-1895, 12.5 cu. ft.*
- Records of the Philadelphia Divinity School of EDS Archives, 1862-1874, 24 cu. ft.*
- Records of the Episcopal Theological School of EDS Archives, 1867-1974, 40 cu. ft.*
- Records of the Churchman, Inc., 1876-1997, 10 cu. ft.
- Records of the Community of the Way of the Cross, 1893-1998, 11 cu. ft.
- Records and Personal Papers of Louis B. Runk, Church Advocate, 1894-1938, 4 cu. ft.*
- Records of Province VIII (Province of the Pacific), 1902-2012, 9.25 cu. ft.
- Personal Papers of Frederic Whitney Fitts, 1903-1943, 0.7 cu. ft.*
- Records of the Historical Society of the Episcopal Church (HSEC), 1910-1992, 20.6 cu. ft.
- Personal Papers of Massey H. Shepherd, 1913-1990, 39 cu. ft.*
- Personal Papers of Maurice Eldred Votaw, 1922-1949, 1976-1977, 1.0 cu. ft.*

- John Hines Biography Collection of John Shelby Spong, 1924–1990, 1.35 cu. ft./105 MB*
- Records of the DFMS Department of Christian Education, 1927–1982, 2 cu. ft.*
- Records of the Rural Workers Fellowship, 1927–2010, 1.5 cu. ft.*
- Personal Papers of Edward Nason West, 1930–1990, 24.5 cu.
- Personal Papers of Helen Brogden Turnbull, 1939–2000, 4 cu. ft.
- Episcopal Church News Publications, 1940–2009, 27 cu. ft.*
- Personal Papers of Walter C. Righter, 1941–2009, 1 cubic foot
- Records of the Division of Town and Country Work, 1943–1970, 1.75 cu. ft.*
- Personal Papers of Leonel Lake Mitchell, c. 1958–2012, 9 cu. ft.
- Personal Papers of Samuel McCray Garrett, 1965–1986, 1 cu. ft.
- Episcopal Diocesan Ecumenical Interreligious Officers, 1966–2011, 3 cu. ft.
- Records of the Think Tank/Metropolitan Planning, Diocese of California, 1967–1976, 1 cu. ft.
- Records of the National Altar Guild Association, 1967–2009, 2 cu. ft.
- Records of the Episcopal Church Building Fund, 1972–2007, 4 cu. ft.
- Records of Episcopal Renewal Ministries, 1973–2011, 3 cu. ft.
- Records of the Standing Commission on Church Music (James Litton), 1975–1984, 4 cu. ft.
- Records of the Assistant to the Presiding Bishop for Administration, 1978–2000, 7 cu. ft.
- Records of Seedlings Curriculum, 1978–2011, 3 cu. ft.
- Records of the Pacific Basin Conference, Conference Presentations, 1983, .5 cu. ft.*
- Records of Integrity, New York Chapter, 1986–2005, 2 cu. ft.
- Records of Episcopal Council/Partnership for Global Mission, 1989–2010, 1 cu. ft.
- Records of the Office of Pastoral Development, 1990–2005, 3 cu. ft.
- Records of the House of Bishops, Interim Meetings, 2001–2015, 2 cu. ft.
- Records of the General Board of Examining Chaplains (GBEC), 2005–2014, 5 cu. ft.
- Records of the Association of Anglican Musicians, 2005–2019, 2 cu. ft.
- United Thank Offering. Records of the President (Squires), 2014–2018, 1 cu. ft.
- Records of the Court of Review in the Case of J. Jon Bruno, 2018–2019, 5 cu. ft.

Access to Memory: Episcopal Archives Catalog

In preparation for adding records to an Archives Catalog, curators completed a two-stage project in 2020 to standardize and complete a large portion of our archival finding aids that will be the source for catalog entries. The Archives revisited 350 finding aids, some dating back to its move to Austin in the early 1960s and many that were very cursory in their description. All were audited and placed into electronic templates to conform to contemporary standards of archival description. Archivists created new descriptive finding aids for 130 record groups. These records will be used to populate the online catalog.

Design of the catalog system itself was completed by the end of 2020 utilizing the American standard for archival description known as DACS. The DACS standard was used to program settings in the Access to Memory (AtoM) Public Catalog software system. The staff made important customizations for data display that will enhance the user's ease in navigating the online catalog's search interface. Along with the AtoM system configuration and DACS data model, the archivists created and began using the new classification scheme that will associate collections together intellectually for the user. The scheme will reduce the costly practice of compiling artificial groupings of records physically simply for the purpose of describing and indexing them efficiently. Test records were created in the fall of 2020, and as of this report all systems are 'go' for deploying the first online catalog. Moving the archives and the continuing pandemic constraints will be hurdles for this necessary project in 2021, but the Director has made this a priority together with preparing the holdings for the next temporary site.

A Sustainable Building Project

A momentous wave of change and redirection occurred in the status of the Archives since the Canonical Archivist's last report to General Convention. The near certainty in our 2018 report that the Archives was on the verge of achieving the multi-decade goal of a permanent and adequate home for the Episcopal Church's archives appeared to collapse in a moment of institutional hesitation. By mid-2018, after repeated delays in the construction timetable, the Archivist, the Board, and the project consultant agreed that the prudent decision was to withdraw from the downtown Austin site and release the developer to seek their own favorable conditions for future construction.

Their recommendation to management and Executive Council was that the time had arrived to recognize the investment gain and pursue feasible second choice sites. Principal on the line of credit loan had been steadily reduced by revenue from the parking lot on the downtown site. Selling the land at its appreciated value would produce a handsome profit to more than cover the cost of a fine archives building on a good site and endow it with funds to release the Church budget of the building's ongoing costs.

The Executive Council decided in 2019 to stand back from previous commitments of fifteen years and to defer an archives building for another day. Funds from the sale of the Austin property were divided between short-term accounts and an undesignated trust fund without reference to the Church's archives. Conversations continue in other quarters that offer possibilities for a future solution. As a Church so deeply entwined with a theological commitment to the historical revelation of God's purpose in our corporate and individual lives, we find ourselves once again postponing to a time uncertain the most basic stewardship responsibility to the Church's institutional and cultural history.

The Seminary of the Southwest's expected date for campus construction was set for June 1, 2021, leading to the inevitable decision in October 2020 to relocate the archival holdings to temporary quarters by June 1, 2021. Executive Council, advised by the administration, selected a five-year interim warehouse lease in north Austin over other options that offered greater insurance against future contingencies and the impact of another move on the physical collections. Although the interim facility is not adequate as an archival facility, it accomplishes the best possible outcome for the limited funds made available by Executive Council. Accomplishing the move in short order, while maintaining safe physical distances, will require an awkward choreography at best. The professional staff have committed to safely transferring the historical records as is our duty to donors and friends of the Archives.

In a volatile world of global pandemic and related economic, social, and climatic realities, new surprises can easily flummox today's prospects and visions. One prays for all things to find their day and to deliver The Episcopal Church and its archives to a faithful and honorable outcome. After twenty-eight years of observing processes of General Convention and its remedy for avoiding troublesome matters, the writer is reminded of a desperate parliamentary procedure, the motion to postpone indefinitely. It is a subsidiary motion used to terminate a main motion without taking a direct vote that would commit to it. The hope remains that this is not the process we have inadvertently stumbled into for taking care of the difficult and inconvenient matter of the Church's historical archives and records.

Acknowledgments

The Archives curatorial and technical support team accomplished worked under difficult circumstances in this triennial period that challenged their morale and ability to perform with the passion and dedication of the past. Nonetheless, they responded with a high level of true collaboration (not to be lightly confused with cooperation) as we navigated internal setbacks, the new corona virus, and preparations for a move that was not settled upon until October 2020.

Special recognition goes to Administrative Deputy David Hales for unrelenting good spirits and careful oversight of the routines of operations and so many "other duties as assigned" that make him a jack of all the archival trades. The curatorial staff have excelled in meeting the challenge of electronic records archiving and preservation. Corrinne Collett has given one hundred and ten percent in developing the Digital Repository as Records Management Archivist in New York, and Whitney Hughes, the Digital Archivist, keeps numerous systems and the flow of digital data fresh, responsive, and accurate. Our research team is led by the seasoned and wise oversight of the Research Archivist Chris Paton. Our collections management portfolio in this triennium has been under the care of our newest member Trina Purcell. The part-time archivists, some credentialed and

some bringing skills from other fields of the humanities and technology have been nearly peerless in their adaptability and keen interest in achieving the best outcomes in their work for the Episcopal Archives: Katie Buonanno, Jamila Davey, Keely Drummond, Amy FitzGerald, Rachael Gilg, Patrick Goetz, Ellie Miller, Kate Orazem, and Sarah Sauri.

This reporting period was unparalleled in the demands it placed on the Chair, members of the Executive Committee, and the Archives Board. The Board itself was enormously fruitful in producing a new vision to lead the Church to whatever next steps await these valuable historical collections, and we give thanks for their talent and spirit. The Archives Board's authority was kept distant and in check with diminished opportunity to voice their gifts to inform and advise the whole Church. As a cultural institution, it is charged to monitor and communicate the historical mission of the Church. If there is any surface ambiguity in its design, it derives from its dual ministry as both an administrative and program arm of the General Convention and the Domestic and Foreign Missionary Society. The Board's value lies in its credibility as an independently minded and representative body of oversight. As executive director of the Archives, this writer owes great thanks to the Chair, Ms. Pan Adams-McCaslin, and the members of the Executive Committee and the entire Board for their wise, candid, and always loving counsel in safeguarding the direction of the Archives.

Mark J. Dufy
Canonical Archivist and Director
December 15, 2020

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Mandate

Canon I.8

Sec. 1. The Church Pension Fund, a corporation created by Chapter 97 of the Laws of 1914 of the State of New York as subsequently amended, is hereby authorized to establish and administer the clergy pension system, including life, accident and health benefits, of this Church, substantially in accordance with the principles adopted by the General Convention of 1913 and approved thereafter by the several Dioceses, with the view to providing pensions and related benefits for the Clergy who reach normal age of retirement, for the Clergy disabled by age or infirmity, and for the surviving spouses and minor children of deceased Clergy. The Church Pension Fund is also authorized to establish and administer the lay employee pension system and denominational health plan of the Church, substantially in accordance with the principles adopted by the General Convention of 2009 in Resolution 2009-A177, with the view to providing pensions, health care and related benefits for the eligible Clergy and eligible lay employees of this Church, as well as their eligible beneficiaries and dependents.

Sec. 2. The General Convention at each regular meeting shall elect, on the nomination of a Joint Committee thereof, twelve persons to serve as Trustees of The Church Pension Fund for a term of six years and until their successors shall have been elected and have qualified, and shall also fill such vacancies as may exist on the Board of Trustees. Effective January 1, 1989, any person who has been elected as a Trustee by General Convention for twelve or more consecutive years shall not be eligible for reelection until the next regular General Convention following the one in which that person was not eligible for reelection to the Board of Trustees. Any vacancy which occurs at a time when the General Convention is not in session may be filled by the Board of Trustees by appointment, ad interim, of a Trustee who shall serve until the next session of the General Convention thereafter shall have elected a Trustee to serve for the remainder of the unexpired term pertaining to such vacancy.

Sec. 3. For the purpose of administering the pension system, The Church Pension Fund shall be entitled to receive and to use all net royalties from publications authorized by the General Convention, and to levy upon and to collect from all Parishes, Missions, and other ecclesiastical organizations or bodies subject to the authority of this Church, and any other societies, organizations, or bodies in the Church which under the regulations of The Church Pension Fund shall elect to come into the pension system, assessments based upon the salaries and other compensation paid to Clergy by such Parishes, Missions, and other ecclesiastical organizations or bodies for services rendered currently or in the past, prior to their becoming beneficiaries of the Fund. For the purpose of administering the lay employee pension system and denominational health

plan, The Church Pension Fund shall be entitled to collect from all Parishes, Missions, and other ecclesiastical organizations or bodies subject to the authority of this Church, and any other societies, organizations, or bodies in the Church which under the regulations of The Church Pension Fund shall elect to come into the lay employee pension system, assessments and/or contributions based upon the salaries and other compensation paid to eligible lay employees by such Parishes, Missions, and other ecclesiastical organizations or bodies, determine the eligibility of all Clergy and lay employees to participate in the denominational health plan through a formal benefits enrollment process, and The Church Pension Fund shall be entitled to levy upon and collect contributions for health care and related benefits under the denominational health plan from all Parishes, Missions, and other ecclesiastical organizations or bodies subject to the authority of this Church with respect to their Clergy and lay employees.

Sec. 4. The pension system shall be so administered that no pension shall be allotted before there shall be in the hands of The Church Pension Fund sufficient funds to meet such pension, except as directed by the General Convention in 1967.

Sec. 5. To every Member of the Clergy who shall have been ordained in this Church or received into this Church from another Church, and who shall have remained in service in the office and work of the Ministry in this Church for a period of at least twentyfive years, and in respect of whom the conditions of this Canon shall have been fulfilled in the payment of assessments on such reasonable basis as The Church Pension Fund may establish under its Rules of Administration, The Church Pension Fund shall provide a minimum retiring allowance the amount of which shall be determined by the Trustees of the Fund, and shall also provide surviving spouses' and minor children's allowances related thereto. In the case of a Member of the Clergy in whose behalf assessments shall not have been fully paid for a period of at least twenty-five years, The Church Pension Fund shall be empowered to recompute the aforesaid minimum retiring allowance and the other allowances related thereto at a rate or rates consistent with the proper actuarial practice. The Trustees of The Church Pension Fund are hereby empowered to establish such Rules and Regulations as will fulfill the intention of this Canon and are consistent with sound actuarial practice. Subject to the provisions of this Canon, the general principle shall be observed that there shall be an actuarial relation between the several benefits; Provided, however, that the Board of Trustees shall have power to establish such maximum of annuities greater than two thousand dollars as shall be in the best interest of the Church, within the limits of sound actuarial practice.

Sec. 6. An Initial Reserve Fund, derived from voluntary gifts, shall be administered by The Church Pension Fund so as to assure to clergy ordained prior to March 1, 1917, and their families, such

addition to the support to which they may become entitled on the basis of assessments authorized by this Canon as may bring their several allowances up to the scale herein established.

Sec. 7. The action of the Trustees of the General Clergy Relief Fund, in accepting the provisions of Chapter 239 of the Laws of 1915 of the State of New York authorizing a merger with The Church Pension Fund, upon terms agreed upon between said two Funds, is hereby approved. Any corporation, society, or other organization, which hitherto has administered clergy relief funds, may to such extent as may be compatible with its corporate powers and its existing obligations, and in so far as may be sanctioned in the case of diocesan societies by the respective Dioceses, merge with The Church Pension Fund, or if merger be impracticable, may establish by agreement with The Church Pension Fund the closest practicable system of co-operation with that fund. Nothing herein contained shall be construed to the prejudice of existing corporations or societies whose funds are derived from payments made by members thereof.

Sec. 8. Women ordained to the Diaconate prior to January 1, 1971, who are not employed in active service on January 1, 1977, shall continue to have the benefit of their present provisions for pension protection at the expense of their employers, through the Pension Plan for Deaconesses provided by the Church Life Insurance Corporation, or through some other pension plan providing equivalent or better guarantees of a dependable retirement income, approved by proper authority. Women ordained to the Diaconate prior to January 1, 1971, and who are employed in active service on or after January 1, 1977, shall be entitled to the same provisions for pension protection as other Deacons based on prospective service on or after January 1, 1977. Women ordained to the Diaconate on or after January 1, 1971, shall be entitled to the same pension protection as other Deacons.

Sec. 9. The General Convention reserves the power to alter or amend this Canon, but no such alteration or amendment shall be made until after the same shall have been communicated to the Trustees of The Church Pension Fund and such Trustees shall have had ample opportunity to be heard with respect thereto.

Summary of Work

OVERVIEW

In response to a study authorized by General Convention, The Church Pension Fund (CPF) was established in 1914 to provide pension benefits for clergy of the Episcopal Church. Since 1917, CPF has been the sponsor and administrator of The Church Pension Fund Clergy Pension Plan, a defined benefit plan. CPF also sponsors and administers The Episcopal Church Lay Employees' Retirement Plan for eligible lay employees, as well as retirement savings plans that help clergy and lay employees invest and save for retirement. Through CPF and its affiliates, collectively the Church Pension Group (CPG), other benefits and programs, property and casualty insurance, and liturgical and other published materials are offered to clergy, lay employees, and Church institutions. Church Publishing Incorporated, a division of CPG, also offers products to the public through brick-and-mortar and online retailers. Details of the full range of CPG's products, programs, and services are on cpg.org.

To meet the obligations under the pension and other benefit plans that CPG administers, CPF holds and invests assets contributed by employers and individuals. In managing its investments, CPF looks for opportunities to realize attractive risk-adjusted returns, while also achieving important social goals that support Church values.

CPF has taken a proactive approach to socially responsible investing (SRI)⁽¹⁾ that is consistent with its fiduciary duties. Its strategy includes these practices:

- ***Investing for Positive Impact***

CPF proactively seeks out and invests with managers who deliver both strong returns and positive social and environmental outcomes. Examples of CPF's impact investments that support Church values include investments in renewable energy, affordable housing, and sustainable agriculture.⁽²⁾

- ***Shareholder Engagement***

CPF uses its position as an institutional investor to influence the behavior of companies in its investment portfolio. Working with the Executive Council's Committee on Corporate Social Responsibility (CCSR), through shareholder engagement CPF has addressed issues such as diversity on corporate boards, human rights, and climate change.

- ***Thought Leadership***

CPF shares its experience as an institutional investor and its industry relationships to create awareness of effective strategies in socially responsible investing. By collaborating with other investors, CPF helps advance industry best practices and increase investments in the space.⁽³⁾

- ***Incorporation of Environmental, Social, and Governance Issues***

CPF has engaged with many managers of CPF investment assets to evaluate the extent to which they incorporate environmental, social, and governance (ESG) issues into their investment analysis. In many cases, the ESG issues that investors find material align with the values of CPF and its beneficiaries. Considering ESG factors can help drive long-term investment returns, consistent with fiduciary duty, while also supporting Episcopal Church values.

In everything it does, CPG is guided by a set of core values—compassion, professionalism, and trustworthiness—that distinguish it from similar, secular organizations. This Blue Book submission summarizes CPG’s work over the past triennium.

SUMMARY OF WORK

CPG’s vision is to provide its clients with the highest possible level of financial security in retirement that is consistent with exemplary financial stewardship on its part and with the evolving needs of the Church.

Providing the Highest Possible Level of Financial Security in Retirement

CPG offers a variety of pensions and retirement savings programs for eligible clergy and lay employees:

- **The Church Pension Fund Clergy Pension Plan** (Clergy Pension Plan)⁽⁴⁾ is a defined benefit pension plan, which means it provides a benefit based on a predefined formula that takes into account each cleric’s number of years of credited service with the Church and compensation history. All ordained clerics in the US, US Virgin Islands, the Convocation of Episcopal Churches in Europe, and Micronesia are eligible to participate in the Clergy Pension Plan if they meet certain minimum criteria and pension assessments are paid on their behalf. The current assessment rate is 18% of each cleric’s compensation. Participation in the plan also provides additional ancillary benefits to eligible clergy, such as a post-

retirement medical subsidy, life insurance, and disability benefits. Clergy can supplement their Clergy Pension Plan benefits with personal retirement savings through **The Episcopal Church Retirement Savings Plan (RSVP)**.⁽⁵⁾

- Eligible Episcopal clergy serving in Province IX and most of the other non-domestic dioceses of the Church participate in a different defined benefit pension plan called **the International Clergy Pension Plan (ICPP)**.⁽⁶⁾ The ICPP has many of the same generous features as the Clergy Pension Plan, including a monthly subsidy to help with the cost of healthcare in retirement. Minor differences between the two plans address the unique needs of the non-domestic dioceses. The ICPP is provided to eligible clergy who are canonically resident in a diocese of the Church and serving in a non-domestic diocese of the Church or who are canonically resident in a diocese of the Anglican Communion that is part of the Iglesia Anglicana de la Región Central de América (IARCA).⁽⁷⁾
- CPF also administers companion clergy pension plans that are sponsored and controlled by The Anglican Church of Mexico and The Episcopal Church in Liberia, as well as a pension plan for lay employees in the Diocese of Puerto Rico that is sponsored and controlled by the diocese.
- Eligible lay employees receive pension benefits from CPF too. **The Episcopal Church Lay Employees' Retirement Plan (Lay Defined Benefit Plan)**⁽⁸⁾ is a defined benefit plan with a 9% assessment rate. An employer must adopt the Lay Defined Benefit Plan before an eligible employee can participate in the plan. Most employers have decided not to offer a defined benefit pension to their lay employees. Instead, the overwhelming majority of employers offer **The Episcopal Church Lay Employees' Defined Contribution Retirement Plan (Lay Defined Contribution Plan)**,⁽⁹⁾ which is a tax-advantaged retirement savings program like the 401(k) plans offered by many secular employers. Participation in the Lay Defined Contribution Plan is robust and has increased substantially since the 76th General Convention established a mandatory Lay Employee Pension System in 2009.
- **The Fund for Special Assistance** provides grants to retired clergy, surviving spouses, and dependents receiving benefits and experiencing a specific, extraordinary financial challenge. CPF granted assistance of \$77,635 in 2018, \$115,200 in 2019, and \$39,500 through August 2020 from this fund.

In addition to pensions, retirement savings, and the Fund for Special Assistance, CPG facilitates financial stability in retirement by providing access to comprehensive quality healthcare. CPG understands that unanticipated and unmanaged healthcare issues can erode personal savings and compromise financial security.

- In response to General Convention Resolution 2009-A177, The Episcopal Church established a denominational health plan for domestic dioceses of the Church, with benefits to be provided by The Episcopal Church Medical Trust (Medical Trust), an affiliate that is part of CPG. From the beginning, **The Episcopal Church’s Denominational Health Plan (DHP)**⁽¹⁰⁾ had two distinct and independent ambitions: 1) cost containment for the Church in light of continually rising healthcare costs and 2) equal access to and parity of funding for healthcare benefits for eligible clergy and lay employees in the domestic dioceses.
- From 2011 to 2019, US employers’ premiums increased by an average of 5% to 10.7% annually. The average increase to Medical Trust employer groups was 4.3% to 7.2% over the same period of time. Also, as of early 2020, 81 dioceses had implemented cost-sharing/parity policies to provide equal access to benefits for clergy and lay employees. CPG continues to listen closely to clients and, when prudent and appropriate, adjust benefits in response to feedback. (See endnotes for additional information.⁽¹¹⁾)
- CPG’s **Fund for Medical Assistance**⁽¹²⁾ offers financial assistance to eligible clergy, lay employees, and dependents in non-domestic dioceses who are facing healthcare expenses that are not otherwise covered by public or private insurance programs in their countries. CPF granted assistance of \$18,284 in 2018, \$55,355 in 2019, and \$15,641 through August 2020 out of this fund, and it continues to publicize the availability of the fund in dioceses that can use it.

Practicing Exemplary Financial Stewardship

The CPF Board of Trustees (CPF Board) oversees the financial strength of CPF, including the critical component of investment performance. CPF’s financial sustainability depends on two things: strong investment returns and exemplary financial stewardship.

As of September 30, 2020, CPF’s assets were \$14.8 billion (unaudited). Assets available for benefits in the Clergy Pension Plan were \$10.2 billion (unaudited) and assets available for benefits in the Lay Defined Benefit Plan were \$227 million (unaudited). Updated numbers through the fiscal year ending March 31, 2021, will appear in the 2021 CPG Annual Report, which will be published and available on cpg.org in July 2021.

CPF stress tests its pension assets and liabilities annually to determine its level of confidence that it will have enough assets in future years to meet obligations to pension plan participants. Recent stress tests of the Clergy Pension Plan show that CPF has an appropriate level of assets to honor the plan’s future commitments, with plan expenses and revenues managed conservatively. However, the

Clergy Pension Plan does not have sufficient assets to significantly enhance benefits or reduce the level of assessments without revisiting the level of benefits currently offered.

Similar stress tests are run for the Lay Defined Benefit Plan, which is newer, smaller, and funded by a lower assessment rate than the Clergy Pension Plan (9% for lay employees vs. 18% for clergy). The Lay Defined Benefit Plan is in a weaker financial position than the Clergy Pension Plan, and the CPF Board has taken a more conservative approach to plan benefits. For example, over the past triennium, the CPF Board did not grant discretionary cost of living adjustments (COLAs)⁽¹³⁾ for the Lay Defined Benefit Plan because doing so would have compromised the financial strength of the plan.

Identifying and Responding to the Evolving Needs of the Church

CPG is intentional about tracking trends and reaching out to individuals and groups around the Church to learn, share, deepen relationships, and collaborate for the benefit of those it serves.

Enhancing Clergy Benefits Under the International Clergy Pension Plan

CPG's prior work responding to Resolution 2015-A181, Study Costs of Pension Benefits in Foreign Dioceses, allowed CPG to take a closer look at non-domestic compensation and benefits. Insights from CPG's published report⁽¹⁴⁾ and conversations with Province IX Bishops revealed that the International Clergy Pension Plan (ICPP) offers robust benefits that are higher than pensions offered by other denominations and the general marketplace.

However, CPG identified opportunities to further enhance the benefits provided to eligible ICPP participants:

- **Periodic benefit adjustment analysis**—Clergy retirees, or their beneficiaries who are receiving a pension benefit from the ICPP, traditionally receive the same COLA as retirees and beneficiaries living in the US. In 2020, after reviewing the implications of this approach for CPF and participants in the ICPP, the CPF Board decided that going forward, CPF should perform an analysis of local inflation and exchange rates every three years and grant a supplement to COLA when appropriate; any such supplement will be capped at 5%.
- **Banking fee subsidy**—Effective in 2021, CPF will provide a flat US \$40 per month subsidy to eligible clergy retirees and beneficiaries to offset international banking fees. CPF is continuing to explore opportunities to reduce banking fees.
- **Disability benefits**—CPF is in the process of restructuring short-term and long-term disability benefits to align them more closely with disability coverage offered to active clergy in the US.

- **Healthcare support**—CPF will periodically review and, if necessary, adjust the Major Medical Supplement benefit provided to eligible retired clergy and surviving spouses, which has not changed since 2009. Effective January 1, 2021, the Major Medical Supplement will increase from \$160 per month to \$170 per month.
- **Spanish translations**—CPG continues to increase the number of materials and resources available in Spanish⁽¹⁵⁾ and other languages.
- **Welcoming the Episcopal Diocese of Cuba**—When General Convention passed Resolution 2018-A238, Admit Episcopal Diocese of Cuba as a Diocese of The Episcopal Church, to welcome The Episcopal Church of Cuba back into The Episcopal Church, CPG was there to help. Following the passage of the resolution, CPG worked to integrate Cuba’s eligible clergy into the ICPP and educate diocesan leaders on CPG and the benefits, programs, and services that CPG offers. See CPG’s response to Resolution 2018-A238 in *Responses to General Convention*, below.

Inviting Conversation and Studying Trends

Over the past triennium, Mary Kate Wold, CPG’s Chief Executive Officer and President, and numerous other CPG leaders have traveled extensively and hosted in-person and online events to engage in meaningful conversations about evolving client needs. Responding to resolutions passed by the 79th General Convention, CPG initiated a study of parity and equity in benefits.⁽¹⁶⁾ ⁽¹⁷⁾ CPG’s conversations with different groups of clergy and lay employees highlighted social justice issues that extend beyond benefits. Race, ethnicity, gender, sexual orientation, geography, and type of ministry play a role in professional development, career trajectory, compensation philosophy, and benefits. CPG will summarize its findings in various reports to General Convention or the Executive Council, and it has pledged to support the Church as it tackles some of these social issues.

Over the same period of time, CPG’s Research and Data team⁽¹⁸⁾ has conducted surveys and focus groups with clergy and lay employees to better understand their perspectives, hopes, and concerns about retirement planning. The research revealed that CPG’s clients are better informed than the general population in a number of areas but also exhibit some gaps in understanding relevant financial issues. CPG is using these insights to take a fresh look at its educational programming so that it can continue to anticipate and serve client needs. Matthew Price, PhD, Senior Vice President of Research and Data at CPG, summarized the results of recent surveys in videos posted on the Research page of CPG’s website.⁽¹⁹⁾

Intentional Outreach and Relationship Building

In 2019, the Rev. Clayton D. Crawley, a longstanding member of CPG’s executive leadership team, was named Chief Church Relations Officer and leader of CPG’s Church Relations team. In this new role, Father Crawley oversees CPG’s ongoing relational work around the Church with his colleague the Rev. Canon Anne Mallonee, who serves as CPG’s Chief Ecclesiastical Officer.

Among other duties, Father Crawley and Canon Mallonee facilitate semi-annual meetings between the executive leadership team of the Domestic and Foreign Missionary Society of the Protestant Episcopal Church and CPG’s own executive leadership team. Father Crawley consults with the Rev. Canon Michael Barlowe on General Convention matters and participates in regular COVID-19 conference calls with the House of Bishops and their Canons to the Ordinary. Father Crawley and CPG’s Church Relations group oversee outreach to newly-elected bishops and intervene on complex service matters that require special attention.

Father Crawley and Canon Mallonee’s relationships around the Church, deep understanding of Church polity and practice, and years of experience at CPG make them an effective bridge between Church polity and CPG’s fiduciary responsibilities.

Responding to Two Pandemics:

A Statement from Mary Kate Wold, Chief Executive Officer and President of CPG

To say 2020 was a challenging year—from the COVID-19 pandemic that brought illness, death, and market volatility, to the senseless killings of Black people, which brought urgent attention to the ongoing pandemic of racial injustice in the US—would be an understatement. During these times of pain and uncertainty, CPG remained a stable and supportive presence, not only for the Church but also for our employees.

A Commitment to Equality

The sin of systemic racism affects us all, and we at CPG stand united with the Church and with others who are actively pursuing change. We understand the critical role diversity, inclusion, and equity play in the health of our organization and in our service to the Church. We take care to recruit, develop, and promote talented employees of color into positions of authority because we believe diversity at every level at CPG contributes to our success.

Our longstanding commitment to inclusion has resulted in a diverse workforce that continues to thrive, learn, and engage in constructive conversations about difference. Thought leaders such as Catherine Meeks, PhD, Executive Director of the Absalom Jones Center for Racial Healing and Church Publishing author;⁽²⁰⁾ Shawn Rochester, author of *The Black Tax: The Cost of Being Black in America*; and the Most Reverend Michael B. Curry have visited with us and have spoken about the experience of racism, the promise of equality, and the difficult work we all are called to do—to love our neighbors as ourselves.

Employee-led affinity groups provide opportunities for people of color and other demographics to support one another, and ongoing diversity and inclusion training for employees and the CPF Board continues to keep issues of equality front and center in our work. Racial tension can undermine the collaborative culture of any organization, and we are doing everything in our power to advance our understanding so we can create even more space for healing and reconciliation at CPG.

Managing in Uncertain Times

As soon as we started to detect that there was a serious public health crisis on the horizon, we began thinking about how CPG, in the context of our mission, could support the Church during this unique time. We implemented a four-month waiver of clergy pension assessments to alleviate financial stress for the neediest parishes, and we deferred premium payments for medical benefits, life insurance, and property and casualty insurance.

As of March 1, 2020, the Medical Trust began waiving all copays, deductibles, and coinsurance for healthcare services related to the evaluation of and testing for COVID-19. For healthcare services related to the treatment of this disease for its active members, the Medical Trust also began waiving all copays, deductibles, and network coinsurance, effective March 1, 2020. The Medical Trust will continue to waive the out-of-pocket costs described above through at least December 31, 2021.

We made various books and other resources available free of charge so worship and formation could continue during the pandemic, and we used every digital platform at our disposal to be in touch with the Church. We hosted educational programs for individuals focused on their wellness, professional development conferences for benefits administrators, and routine check-ins with bishops and others on the needs of their dioceses and the availability of CPG resources to help.

In our 2020 Annual Report, we feature a video⁽²¹⁾ that highlights the work of the Rev. Len Freeman and the Rev. Lindsay Freeman, chaplains to the retired from the Diocese of Minnesota. It describes how they have found joy in discovering new ways to overcome isolation and deliver pastoral care during the pandemic. Witnessing the impact of COVID-19 on many individuals around the Church, we

are continuing to facilitate compassionate conversations and have partnered with third parties to offer educational webinars and brief videos about financial, emotional, and psychological well-being amid uncertainty. These initiatives have helped to ensure that we remain a stable presence in challenging times.

Finally, from a financial standpoint, the markets were volatile; but market volatility is something we prepare for, always. Years of experience have taught us that diversification, investing for the long-term, and actively managing our liquidity are drivers of success and strength. We have utilized these strategies to weather past market volatility, and we will undoubtedly use them again when the next period of volatility occurs. Roger Saylor, Chief Investment Officer of CPG, has shared his thoughts on recent market volatility in a short video on our website, which I recommend to anyone who would like to hear more about how CPG addresses volatility in the markets.⁽²²⁾

For more about how CPG is supporting the Church during the coronavirus pandemic, please visit the COVID-19 Resource Center on CPG's website.⁽²³⁾

Using Technology to Better Serve Clients

CPG is focused on giving its clients quick, convenient, and safe access to information and benefits because clients are requesting it.

- **Web self-service**—Recent enhancements to CPG's website allow individuals to update their personal and demographic information, obtain a pension estimate, or view their annual statement online in a centralized location.
- **Interactive clergy compensation report**⁽²⁴⁾—CPG's annual Episcopal Clergy Compensation Report of clergy compensation in US and non-domestic dioceses (international dioceses and those within US territories) is now a map-based graphic interface. The report includes compensation categorized by region, age, gender, employment status, parish size, and operating revenue. The new interactive version makes it faster and easier for users to access this important information. The report features pulldown menus to quickly filter the information by category, while year-over-year differences are displayed in colorful charts. Stakeholders have a fuller picture of the clergy employment landscape to help them discern compensation trends across the Church.
- **eLearning**—CPG has expanded its library of online courses⁽²⁵⁾ so its clients can learn what they want, when they want. Courses cover a range of topics, from *Protecting Yourself from Financial Fraud* to *Facing Dementia: Important Information for Caregivers and Older Adults*.

- **Growing social media presence**—CPG has expanded its social media presence to give individuals an inside look at the people and programs that comprise the organization. Its social media channels now include YouTube,⁽²⁶⁾ Instagram,⁽²⁷⁾ Twitter,⁽²⁸⁾ LinkedIn,⁽²⁹⁾ and Facebook.⁽³⁰⁾ All deputies and bishops are encouraged to follow CPG on these social media platforms.

Other Products and Services Available Through CPG

Property and Casualty Insurance

For more than 90 years, The Church Insurance Companies (CIC)⁽³¹⁾ have focused on providing the Church broad, cost-effective property and casualty insurance coverage along with robust risk management strategies and tools in a financially sustainable way. Its commitment to serving the needs of the Church remains unchanged, but the world around it is evolving. To adapt to the changing marketplace, CIC has been proactive in addressing the needs of its clients by creating new coverage options and updating existing policies, including these:

- **Church as sanctuary**—CIC has made available an endorsement to provide coverage for legal defense and other costs.
- **Malicious attack**—CIC now provides this insurance, which includes coverage for crisis management and counseling costs, to all policyholders.
- **Reduced deductible for named storms**—CIC has reduced the deductible to 2% of the property's value for churches in the contiguous US.
- **Cyber liability**—CIC now provides coverage up to \$250,000 to all policyholders.
- **New flood coverage limit**—While industry policies do not typically offer flood insurance, CIC provides coverage up to \$1 million.

In October 2020, Christopher R. Rourke was named Senior Vice President and General Manager of CIC, succeeding William Murray. Mr. Rourke is a proven leader with a track record of success in commercial property and casualty underwriting and risk management. He has held senior management positions in insurance organizations throughout the US and was most recently President of Berkley North Pacific Group, a commercial insurance provider. His industry expertise and commitment to customer service will ensure that CIC remains a stable presence for its clients when they need CIC most.

Church Publishing Incorporated

Founded in 1918 as The Church Hymnal Corporation, Church Publishing Incorporated (CPI)⁽³²⁾ publishes official worship materials and resources for The Episcopal Church and serves as a multi-faceted publisher and supplier to the broader ecumenical marketplace. CPI produces some 50 new books and resources each year and manages a portfolio of more than 2,000 active titles and resources, many of which are sold worldwide.

CPI's commitment to social justice is demonstrated by its more than 100 resources on racial justice, climate and environmental concerns, and LGBTQ/gender equity. *Preaching Black Lives (Matter)* by Gayle Fisher Stewart, which CPI released in July 2020, achieved the rank of number one in Amazon.com's ethics in Christian theology section. The publisher's first audiobook, *Passionate for Justice* by Catherine Meeks and Nibs Stroupe (with a foreword by Stacey Abrams), is available for download.⁽³³⁾ Also, under the guidance of an advisory council launched in 2020, CPI is increasing its Spanish-language resources so it can be even more inclusive of the diverse voices that comprise the Church.

In November 2020, CPG appointed Airié Stuart to serve as Senior Vice President and Publisher of CPI. Ms. Stuart's background includes positions at both trade and scholarly/academic publishing houses. Prior to joining CPI, she held executive positions at John Wiley & Sons, Simon & Schuster, and HarperCollins and served as publisher of Palgrave Macmillan. She succeeds Senior Vice President Mark Dazzo, who retired from CPG in September 2020.

The Church Pension Fund and Affiliated Companies

The Church Pension Fund	Participants
Clergy Pension Plan	18,308
Lay Defined Benefit Plan	4,199
Lay Defined Contribution Plan	17,740
RSVP Plan	4,983

The Episcopal Church Medical Trust

Clergy		
Active	3,971	} 38,738
Retired and surviving spouses	5,335	
Lay employees		
Active	11,024	
Retired and surviving spouses	2,622	
Family members		
Active (clergy & lay employees)	12,904	
Retired (clergy & lay employees)	2,882	

Church Life Insurance Corporation

Group life insurance	22,280
Individual life insurance	1,012
Annuities	3,296

The Church Insurance Companies

The number/percentage of Episcopal churches and dioceses that purchase their property and casualty insurance from The Church Insurance Company of Vermont or The Church Insurance Agency

Corporation

Churches	5,846 / 90%
Dioceses	96 / 96%

Church Publishing Incorporated

Books in print	997
Church supplies	429
Christian education resources	298
eBooks	906
eProducts	42

As of September 30, 2020

THE CHURCH PENSION FUND BOARD AND GOVERNANCE

CPF is governed by a 25-member board of trustees; 24 are elected by General Convention. The 25th trustee, CPF's Chief Executive Officer and President, is elected by CPF Board members and serves at their will.

THE WORK OF THE CPF BOARD

With input from CPG's Executive Leadership Team, the CPF Board makes critical policy decisions affecting investment strategy, pensions, and other benefits and services. It oversees the strategic direction of a broad and varied consortium of businesses while ensuring that the financial strength of the organization remains intact.

The participation of lay and ordained Church leaders as well as experienced investment managers, attorneys, and business and financial professionals all enrich the CPF Board. It is essential to bring to the board's deliberations the most expert and thoughtful advice available to the Church. The complexity of CPG's work and the legal duties of care and loyalty require that each trustee be informed and engaged.

THE ELECTION PROCESS AND THE CURRENT CPF BOARD

As set out in the Canons of The Episcopal Church, each General Convention elects 12 trustees, selecting from the slate of nominees presented by the Joint Standing Committee on Nominations.

Six current trustees—Kevin B. Lindahl, Esq., Sandra Ferguson McPhee, Esq., the Rt. Rev. Brian N. Prior, the Rt. Rev. Gregory H. Rickel, Canon Anne M. Vickers, CFA, and the Rev. Canon Dr. Sandye A. Wilson—were elected to their first six-year terms at the 2015 General Convention. Therefore, they are eligible and have agreed to stand for re-election at the upcoming General Convention. The following six trustees are retiring from the CPF Board in 2021, having faithfully served the two consecutive six-year terms allowed by the Canons: Martha B. Alexander, EdD, the Rt. Rev. Thomas James Brown, the Very Rev. Tracey Lind, the Rev. Dr. Timothy J. Mitchell, Margaret A. Niles, Esq., and Sandra S. Swan, DHL.

The current CPF Board will remain in place until the House of Deputies elects, and the House of Bishops confirms, a new slate of trustees.

The Church Pension Fund Board of Trustees	
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CPG EXECUTIVE LEADERSHIP CHANGES

In April 2019, Ellen Taggart succeeded Daniel Kasle as Executive Vice President and Chief Financial Officer (CFO) of CPG. Prior to her appointment, Ms. Taggart served as CPG's Senior Vice President, Strategic Planning and Project Management. Previously, she was a Senior Vice President of Finance and CFO at Dun & Bradstreet, where she worked for 17 years with businesses across the US, Europe, Latin America, and the Asia-Pacific region.

In April 2020, Theodore Elias succeeded Maria Curatolo as Executive Vice President and Chief Administrative Officer of CPG. In this role, Mr. Elias is responsible for Human Resources, Facilities/General Services, and Corporate Sustainability. Prior to his appointment, he served as Vice President, Organizational Development, for CPG. Before joining CPG in 2014, he worked for TIAA-CREF, after holding numerous vice president-level positions at JPMorgan Chase.

RESPONSES TO GENERAL CONVENTION

[Divest From Fossil Fuel Companies and Reinvest in Clean Energy \(Resolution 2018-A020\)](#)

...

Resolved, That in light of this statement, that the General Convention urge CPF to be mindful of the Church's desire to become increasingly invested in renewable and clean energy; and be it further

Resolved, That the General Convention request that The Church Pension Fund provide a report that includes a sustainability plan to the 80th General Convention.

CPF has been and continues to be mindful of the Church's desire to become increasingly invested in renewable and clean energy. CPF has actively researched investment opportunities linked to sustainability and renewable/clean energy, which are described in 2018-A020 Sustainability Report at cpg.org/2018A020.

Create a Task Force to Update Safe Church Training (Resolution 2018-A048)

...

Resolved, That this 79th General Convention direct the Executive Council to establish a Task Force... to create and implement new safe church training materials to be developed during the next triennium...; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate their training program with this effort and to appoint a member to serve on the committee.

...

CPG was allotted a seat on the task force authorized by this resolution to create and implement new Safe Church training materials to reflect the 2018 Model Policies, including specialized topics related to ministry roles and a plan to publish, update, and oversee this work.

With the assistance of CPG, the task force defined the scope of the Safe Church program and helped with the selection of the training provider. In addition, CPG collaborated with the task force on its outreach effort and provided guidance on curriculum development.

Create a Task Force on the Relationship of TEC and the CPF (Resolution 2018-A060)

Resolved, That the 79th General Convention invite the Executive Council and The Church Pension Fund to study jointly the historical and current relationship of The Episcopal Church and The Church Pension Fund in order to achieve greater clarity on their respective roles, responsibilities, and authority, and be it further

Resolved, The Executive Council and The Church Pension Fund issue a joint report about this study by December 31, 2019.

The Executive Council and CPF created a task force to study the historical and current relationship of The Episcopal Church and CPF in order to achieve greater clarity on their respective roles, responsibilities, and authority.

The members of the task force—five appointed from the Executive Council and five from CPF—completed the study and prepared the requested report over 18 months.

[Study Parity Between Lay and Clergy Pensions \(Resolution 2018-A237\)](#)

Resolved, That the 79th General Convention urge The Church Pension Fund to report on the current state of parity between the pensions of lay and ordained Church employees, domestic and non-domestic Church employees and Church employees of disparate incomes...; and be it further

Resolved, That The Church Pension Fund consider supplemental models for the pension system that would benefit lay and clergy employees...; and be it further

Resolved, That The Church Pension Fund is invited to present its findings to the 80th General Convention.

In forming its response to Resolution 2018-A237, CPF leveraged the analyses it performed in response to Resolutions 2015-A181, Report on the Costs of Pension Benefits in Foreign Dioceses, and 2018-Do45, Pension Equity for Lay Employees. The report also incorporates insights that were compiled from nearly 20 listening events hosted by CPG on how to achieve pension equity. The events were held from May 2019 through March 2020 with clergy, lay employees, and other stakeholders. Participants' comments helped to inform the report.

In its report to be issued in 2021 and prior to the 80th General Convention, CPF will propose supplemental pension models that may address disparities between lay and clergy pensions while the Church works toward parity.

[Admit Episcopal Diocese of Cuba as a Diocese of The Episcopal Church \(Resolution 2018-A238\)](#)

...

Resolved, That immediately upon the close of business of the 79th General Convention, the active clergy of La Iglesia Episcopal de Cuba shall become eligible to participate going forward in the International Clergy Pension Plan (ICPP) and its related plans, which will be administered by The Church Pension Fund (CPF) consistent with the terms of the ICPP...; and be it further

Resolved, That the General Convention direct The Episcopal Church, together with La Iglesia Episcopal de Cuba and other potential ministry partners, in consultation with CPF, to collaborate on a plan to fund the past service liability accrued by the active clergy of La Iglesia Episcopal de Cuba.

...

CPF administers the International Clergy Pension Plan (ICPP) and has successfully enrolled eligible clergy in Cuba into this plan. In its role as the Recorder of Ordinations, CPF has also recorded their canonical reception into The Episcopal Church. In addition, CPF applied for and received the necessary regulatory approvals to commence making benefit payments. Finally, CPF has received from the Domestic and Foreign Missionary Society a significant portion of the money required to credit past service for eligible clergy in Cuba.

In the next triennium, CPF will continue working with the Diocese of Cuba and the Rt. Rev. Griselda Delgado del Carpio to expand educational opportunities for eligible clergy to learn about CPF and the benefits provided under the ICPP.

[Call for Shareholder Advocacy for Environmental Impact \(Resolution 2018-C021\)](#)

Resolved, That the 79th General Convention of The Episcopal Church call upon the Executive Council Committee on Corporate Social Responsibility (CCSR), in conjunction with The Church Pension Fund, to identify 10 companies within our portfolio that significantly impact the environment, and initiate shareholder engagement to advocate for the inclusion of an expert in sustainability on their boards;

...

CPF uses its voice as a shareholder to advance issues of environmental sustainability within the companies in its investment portfolio. Issues of environmental sustainability can present investment opportunities and risks for CPF. Working with the Executive Council Committee on Corporate Social Responsibility (CCSR), CPF has engaged with companies on the issue of sustainability expertise on the board and in corporate management. Having individuals in corporate leadership with the necessary sustainability expertise can help identify relevant opportunities and risks. In pursuing a socially responsible investment strategy, CPF will continue to work closely with the CCSR to coordinate on shared priorities.

CPF's response to Resolution 2018-C021 is included in 2018-A020 Sustainability Report at cpg.org/2018A020.

[Ensure Availability of Multiple Insurance Providers \(Resolution 2018-C023\)](#)

Resolved, That the 79th General Convention requests that the Church Pension Group strive to make available at least two health insurance providers in each diocese; and be it further

Resolved, That in any diocese in which only one health insurance provider is available under the Church Pension Group Denominational Health Plan, and in which the availability of only one

provider would have a material negative impact on the diocese’s employees, congregations, new recruitment, or overall well-being, that diocese will be permitted to seek other insurance options outside of the Denominational Health Plan.

As part of its broader strategy to ensure adequate coverage and choice for its clients, CPG is committed to offering two health insurance plans in each diocese. Having multiple vendors ensures that dioceses geographically distributed throughout the US have adequate access to healthcare benefits.

[Collect Data on Clergy Compensation by Race \(Resolution 2018-C029\)](#)

Resolved, That the 79th General Convention... directs the Recorder of Ordinations to develop and implement a strategy for compiling and reporting canonically resident clergy data by race; and be it further

Resolved, That the Recorder of Ordinations present its strategy to Executive Council at its spring 2019 meeting; and be it further

Resolved, That recognizing the time required to properly compile the data, the Church Pension Group “2020 Clergy Compensation Report,” as well as reports for subsequent years, include data about compensation by race.

[Collect Racial and Ethnic Data on Episcopal Elections and Clergy \(Resolution 2018-D005\)](#)

...

Resolved, That the General Convention calls upon the Recorder of Ordinations to gather data about clergy by race and ethnicity in order to show trends in ordination, deployment, and compensation by race and ethnicity, and to report broadly by electronic and other means.

[Include Gender in the Clergy Compensation Report \(Resolution 2018-D037\)](#)

...

Resolved, That the General Convention direct the Church Pension Group, drawing upon the report of the House of Deputies Special Committee on Sexual Harassment and Exploitation to the 79th General Convention and other relevant resources, expand its Clergy Compensation Report to include greater specificity as it relates to gender identity, bringing together in a single

report as much detailed information as possible, up to the limits of applicable privacy standards and laws; and be it further...

...

Resolved, That the Church Pension Group will report on changes to the Clergy Compensation Report at the Spring 2019 meeting of Executive Council.

At the 79th General Convention, three resolutions were passed that requested that CPG, acting as the Recorder of Ordinations, gather data related to new demographic categories. Specifically, Resolutions 2018-C029, 2018-D005, and 2018-D037 requested that CPG collect data on race/ethnicity and gender identity and include this data in its reports on compensation, ordinations, and deployment. Resolutions 2018-C029 and 2018-D037 also requested that CPG include these demographic categories in its annual Clergy Compensation Report and that differences in compensation be reported at a higher level of detail.

CPG embraced the recommendations. In consultation with the Executive Council of The Episcopal Church, CPG established a mechanism to collect information on race, ethnicity, and gender identity in a way that safeguarded the confidentiality of clergy data while being easily accessible. CPG also agreed to include sexual orientation as an additional data point that would be collected by the Recorder of Ordinations, assisting in fulfilling the data requests contained in 2018-D069, Collect Data on LGBT Clergy Deployment and Compensation.

Data collection commenced in July 2020 and is ongoing.

CPG plans to publish the 2020 Episcopal Clergy Compensation Report with new data on race, ethnicity, and gender identity in 2021, fulfilling the requests contained in Resolutions 2018-C029 and 2018-D037. CPG will also publish a report in 2021 on trends in ordinations, deployment, and compensation, which will fulfill the requests in 2018-D005.

[Study Equity in Clergy and Lay Pension Plans \(Resolution 2018-D045\)](#)

...

Resolved, That The Church Pension Fund be asked to study the steps necessary to provide equity in the pension plans for lay and ordained church workers... and compare the resulting possible plans with the pension benefits offered in comparable, non-church organizations and report the results of that study to Executive Council by July 1, 2020, for communication to the wider church, including but not limited to the 80th General Convention.

In forming its response to Resolution 2018-D045, CPF compared retirement readiness of participants in CPF's defined benefits plans—The Church Pension Fund Clergy Pension Plan and The Episcopal

Church Lay Employees' Defined Benefit Plan—and The Episcopal Church Lay Employees' Defined Contribution Retirement Plan. Insights compiled from nearly 20 listening events hosted by CPG on how to achieve pension equity also helped to inform the report. The events were held from May 2019 through March 2020 with clergy, lay employees, and other stakeholders at meetings organized by the Church and CPG, and with divinity school students. The Lay Retirement Readiness Survey that CPG sponsored in 2018 provided additional supporting details.

The Report Summary at cpg.org/2018D045 analyzes income replacement ratios for plan participants; compares possible plans with pension benefits offered by comparable non-Church organizations; and presents considerations to make the pension plans more equitable.

[Evaluate Meeting Policies and Practices on Alcohol Misuse \(Resolution 2018-D059\)](#)

Resolved, That the 79th General Convention:

...

3. recommends that CREDO develop a program component to help participants explore their relationship to alcohol and substance misuse and other forms of addiction.

...

CPG asked CREDO faculty to incorporate information about alcohol abuse, substance abuse, and other addictions in their presentations. These issues are discussed in CREDO plenaries, workshops, and one-on-one consultations. Every conference includes several 12-step meetings as a part of the standard agenda. CPG held an Affinity CREDO conference for Clergy in Recovery in September 2018, and this will be repeated at least every five years.

End Notes

- (1) Socially Responsible Investing, the Church Pension Group, cpg.org/SRI
- (2) Socially Responsible Investing Videos: Positive Impact Investing Case Studies, the Church Pension Group, cpg.org/SRIvideos
- (3) Insights & Ideas, the Church Pension Group, cpg.org/Insights&Ideas
- (4) The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan), the Church Pension Group, cpg.org/cpp
- (5) The Episcopal Church Retirement Savings Plan (RSVP), the Church Pension Group, cpg.org/RSVP
- (6) The Church Pension Fund International Clergy Pension Plan (ICPP), the Church Pension Group, cpg.org/ICPP
- (7) The non-domestic dioceses of The Episcopal Church are Colombia, Cuba, Dominican Republic, Ecuador Central, Ecuador Litoral, Haiti, Honduras, Puerto Rico, Taiwan, Venezuela, and Virgin Islands (British only). The dioceses of the Iglesia Anglicana de la Región Central de América (IARCA) are Costa Rica, El Salvador, Guatemala, Nicaragua, and Panama.
- (8) The Episcopal Church Lay Employees' Defined Benefit Plan, the Church Pension Group, cpg.org/layDBplan
- (9) The Episcopal Church Lay Employees' Defined Contribution Retirement Plan, the Church Pension Group, cpg.org/layDCplan
- (10) 2019 Denominational Health Plan Annual Report, the Church Pension Group, cpg.org/dhp-annual-report
- (11) Forecasted increases in health plan premiums: Aon plc 2020 Global Medical Trend Rates Report, aon.com
- (12) The Fund for Medical Assistance, the Church Pension Group, cpg.org/FMA
- (13) Cost-of-Living Adjustment (COLA), the Church Pension Group, cpg.org/COLA
- (14) Report from The Church Pension Fund in response to Resolution 2015-A181, Study Costs of Pension Benefits in Foreign Dioceses, the Church Pension Group, cpg.org/2015A181
- (15) The Church Pension Group Spanish website, cpg.org/espanol
- (16) Report from The Church Pension Fund in response to Resolution 2018-A237, Study Parity Between Lay and Clergy Pensions, the Church Pension Group
- (17) Report from The Church Pension Fund in response to Resolution 2018-Do45, Study Equity in Clergy and Lay Pension Plans, the Church Pension Group, cpg.org/2018Do45
- (18) Research & Data, the Church Pension Group, cpg.org/research
- (19) Matthew Price, PhD, Research & Data, the Church Pension Group, cpg.org/price
- (20) Catherine Meeks, PhD, and the Rev. Nibs Stroupe book talk and signing, the Church Pension Group, cpg.org/Meeks-StroupeCPI
- (21) The Rev. Len Freeman and the Rev. Lindsay Freeman, Chaplains to the Retired from the Diocese of Minnesota, on delivering pastoral care during the pandemic, the Church Pension Group, <http://bit.ly/NewConnectionsCPG>

- (22) Roger Saylor, Chief Investment Officer of the Church Pension Group: Market Volatility—A Fact of Life, the Church Pension Group, <http://bit.ly/MarketVolatilityCPG>
- (23) COVID-19 Resource Center, the Church Pension Group, cpg.org/COVID19
- (24) 2019 Clergy Compensation Report, interactive version, the Church Pension Group, cpg.org/compensation2019
- (25) Learning Center for Active Clergy, the Church Pension Group, cpg.org/active-clergy/learning/
- (26) YouTube, the Church Pension Group, youtube.com/ChurchPensionGroup
- (27) Instagram, the Church Pension Group, instagram.com/churchpension
- (28) Twitter, the Church Pension Group, twitter.com/ChurchPension
- (29) LinkedIn, the Church Pension Group, linkedin.com/company/church-pension-group
- (30) Facebook, the Church Pension Group, facebook.com/ChurchPension
- (31) The Church Insurance Companies, cpg.org/CIC
- (32) Church Publishing Incorporated, churchpublishing.org/
- (33) Passionate for Justice: Ida B. Wells as Prophet for Our Time, by Catherine Meeks & Nibs Stroupe, Church Publishing Incorporated, churchpublishing.org

BOARD OF TRUSTEES OF THE GENERAL THEOLOGICAL SEMINARY OF THE EPISCOPAL CHURCH

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Mandate

Mission Statement: Educating and forming lay and ordained leaders for the church in a changing world. Adopted, Board of Trustees, 1999; affirmed October 23, 2015 and May 15, 2019.

Summary of Work

Narrative

Established by resolution in 1817, the General Theological Seminary was the first seminary of The Episcopal Church and the only one founded by the General Convention. In 1827, General moved to its current location on farmland given by Clement Clarke Moore, who was a parishioner at Trinity Wall Street. The establishment of General Seminary gave rise to the neighborhood of Chelsea, currently one of the most vibrant neighborhoods in New York City. It was the express decision of the Convention that the seminary be in New York City, and General's location remains an essential aspect of its character and mission. The seminary defines its ethos as urban, Anglican, Benedictine, and contextual.

Since 2018, we have identified and focused on four strategic pillars to strengthen our mission. First, refining ordination-track programs to respond to the changing needs of the church and the world. The second pillar is to develop vocationally focused degree and certificate programs useful to the wider church and the world. Thirdly, the seminary seeks out and embraces mutually beneficial partnerships and affiliations of all types. The fourth and final pillar has been to engage in a major gifts initiative for the preservation and refreshment of the Chapel of the Good Shepherd as well as initiatives to endow scholarships, programs, and faculty positions.

Over the past four years (2018-2022), General Seminary eliminated its \$3 million annual structured deficit and all debt. The seminary has maintained a balanced budget, and the endowment has grown steadily. The draw rate has continued to decrease, now at 4.9%. Annual giving remains strong.

After receiving reaccreditation (without notations) in 2017, we have continuously refined the curriculum to attract both lay and ordination-track students and students interested in advanced ministerial education. We have designed, received accreditation for, and successfully launched two new degrees: the Master of Arts in Ministry (2018) and the Doctor of Ministry (2019).

In order to develop an engaged and active Board of Trustees, we have successfully reduced its membership from 42 to fewer than 30. Attendance at meetings and engagement in the life of the seminary is steadily increasing.

Alumni involvement has increased with a revitalized Alumni Executive Committee. The emerging focus of ‘volunteer-led, staff-supported’ alumni events is taking root. One example is the celebration of “50 Years of Women at General” in the 2021-2022 academic year (memorializing the 50th anniversary of the matriculation of women onto degree programs). This important milestone will be commemorated with key seminary events and initiatives which celebrate the lasting contributions made by women and non-binary persons to the seminary and the Church.

In response to our increasing awareness of systemic and institutionalized racism, we have taken several steps in the right direction. Under the leadership of Michael Battle, the Desmond Tutu Center has expanded its role in the seminary community in a variety of ways, including the refined approach to community-wide anti-racism training. These trainings have incorporated the Ubuntu Circle methodology and the work of Willie James Jennings, particularly *After Whiteness: An Education in Belonging*.

At the beginning of the COVID-19 pandemic, the seminary pivoted to remote learning, incorporating practices, technologies and pedagogies that were already in place. Not without minor challenges, the dexterity of the faculty and the patience of our students helped the seminary to recognize more fully the value of a hybrid model of education, something which we intend to develop more fully as we head into the future.

As a reflection of our third strategic pillar (“Partnerships and Affiliations”) the seminary has benefited from several Lilly Endowment funded initiatives which have encouraged significant forms of collaboration. Beginning in 2020, the seminary was a founding collaborator with the Episcopal Diocese of New York in “Episcopal Futures”, a \$1m “Thriving Congregations” initiative project funded by the Lilly Endowment. “Episcopal Futures” is a congregationally based approach to missional revitalization guided by the Way of Love curriculum.

In early 2021, while the Seminary was in conversations about collaboration with Virginia Theological Seminary, both schools successfully secured Phase 1 funding from the Lilly Endowment’s “Pathways for Tomorrow” initiative which will be used to catalyze ongoing efforts toward non-competitive and strategic collaboration between the two historic Seminaries. This relationship builds upon a long history of shared work which includes the TryTank, coordinated continuing education events and seminars, and trial plans for a limited number of shared courses in academic year 2021/22.

At the Seminary’s 199th commencement on May 19, 2021, we celebrated the conclusion of The Very Rev. Kurt Dunkle’s 8-year tenure as Dean and President. His leadership played an important role in providing institutional stability, laying a strong foundation from which the next chapter of the Seminary’s history can be written. The Very Rev. Dr. Michael W. DeLashmutt, the Seminary’s Vice President and Dean for Academic Affairs and Associate Professor of Sacred Theology, was called by the board of trustees to serve as Acting Dean and President for the next two years.

We begin this triennium with clarity of vision to be a seminary for the whole people of God, energized by our Anglican, Benedictine, urban and contextual ethos, and equipped to faithfully live into our mission to educate and form leaders for the Church in a changing world.

The Rt. Rev. Robert Wright
Bishop of Atlanta and Chairman of the Board of Trustees

The Very Rev. Dr. Michael W. DeLashmutt
Acting Dean and President

COURT OF REVIEW

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Mr. James Hunt, <i>Lay Alternate</i>	Montana, VI	2021

Representation at General Convention

Deputies Sharon Henes and Christopher Wendell are authorized to receive non-substantive amendments to this report.

Mandate

Amended Canon IV.5.4. a, b and c

Sec. 4. There shall be a court to be known as the Court of Review, with jurisdiction to receive and determine appeals from Hearing Panels of Dioceses as provided in Canon IV.15 and to determine venue issues as provided in Canon IV.19.5.

a. The Court of Review shall consist of: (i) Three (3) Bishops; six (6) Members of the Clergy, which and will include not fewer than two (2) Priests and not fewer than two (2) Deacons; and six (6) lay persons; and (ii) one (1) Bishop, one (1) Priest or Deacon, and one (1) lay person to serve as alternates as hereinafter provided. No more than two (2) be canonically resident in the same Diocese as any other Priest or Deacon, and each lay person, whether a member or alternate, shall reside in a different Diocese than any other lay person. The Priests, Deacons and lay persons shall be or have been members of the Disciplinary Boards of their respective Dioceses.

b. The Bishops on the Court of Review shall be elected by the House of Bishops. One of the Bishops on the Court of Review shall be chosen from Provinces I, II or III; one of the Bishops shall be chosen from Provinces IV, V or VI; and one of the Bishops shall be chosen from Provinces VII, VIII or IX. The clergy and lay members and alternates of the Court of Review shall be elected by the House of Deputies for a three-year term, such that one-third of clergy members and one-third of lay members shall come from Province I, II, or III; one-third shall come from Province IV, V, or VI; and one-third shall come from Province VII, VIII, IX. The Court of Review shall select a president from among its members. The President shall be a Priest, Deacon or lay person.

c. The persons appointed to the Court of Review shall continue to serve until their respective successors have been elected, except in case of death, resignation or declination to serve. Members of the Court of Review who are currently appointed to a panel shall continue to serve on that panel until its work has been completed

Summary of Work

Meetings

The Court was organized in November of 2019 by Executive Council. The Court met in person December 2-4, 2019 in Chicago, Illinois. We subsequently met via Zoom video platform on October 14th, 2020, and December 21st, 2020.

No resolutions were referred to the Court for review.

Summary of Work

Our first meeting, December 2-4, 2019, consisted of a three day training. In addition, the Court elected a President. It also determined it should have a Vice President (should the President be unable to act), that the Court would benefit from having Rules of Procedure, and would benefit from having an internet website for Court information.

During the following year the Court drafted and approved Rules of Procedure for the Court of Review. It elected a Vice President. It created an email account for the President of the Court of Review (court@episcopalchurch.org) for the filing of documents. Finally, it reviewed the Canons of the Episcopal Church and discussed potential amendments to better assist our work, and further clarify the role of the Court of Review and prepared resolutions to achieve those purposes.

No matters came before the Court during this triennium.

Currently, the Court will continue to work on an internet-based website to disseminate information for the Court of Review as required by the Canons, and it continue to review the canons as they pertain to our work.

Proposed resolutions

A074 Resolution Amending Canon III.11.8.a Provision for Written Objections to the election of a Bishop Diocesan

Resolved, the House of _____ concurring, That the 80th General Convention amend Canon III.11.8.a to read as follows:

Within ten days after the election of a Bishop Diocesan, a Bishop Coadjutor, or a Bishop Suffragan by a Diocesan Convention, delegates constituting no less than ten percent of the number of delegates casting votes on the final ballot may file with the Secretary of the Convention written objections to the election process, setting forth in detail all alleged irregularities. Within ten days after receipt thereof, the Secretary of the Convention shall forward copies of the same to the Bishop Diocesan, the Chancellor and Standing Committee of the Diocese, and to the Presiding Bishop, who shall request the Court of Review ~~of the Province in which the Diocese is located~~ to investigate the complaint. The Court of Review may invite response by the Bishop Diocesan, the Chancellor, the Standing Committee and any other persons within the Diocese for which the Bishop was elected. Within thirty days after receipt of the request, the Court of Review shall send a written report of its

findings to the Presiding Bishop, a copy of which report the Presiding Bishop, within fifteen days, shall cause to be sent to the Bishop Diocesan, the Chancellor, the Standing Committee and the Secretary of the Convention of the electing Diocese. The Secretary shall send a copy of the report to each of the delegates who filed objection to the election process.

EXPLANATION

The proposed amendment eliminates residual language referring to the Provincial Court, which under Canon IV is now the church-wide Court of Review, thus making the language of a Province not appropriate.

A075 Resolution Amending Canon IV.5.4 Provision for the Court of Review

Resolved, the House of _____ concurring, That the 80th General Convention amend Canon IV.5.4 to include the addition of a section j. as follows:

j. The Court of Review may extend for good cause any deadlines as set forth in the Canons pertaining to the Court of Review.

EXPLANATION

There are circumstances beyond one's control that could result in missing a deadline (e.g.: the death or disability of counsel). This resolution allows for the Court of Review to extend deadlines due to such circumstances instead of denying relief for failure to timely file.

A076 Resolution Amending Canon IV.15.2 Provision to serve Notice of Appeal

Resolved, the House of _____ concurring, That the 80th General Convention amend Canon IV.15.2 to read as follows:

Within forty (40) days after issuance of an Order by a Hearing Panel, the Respondent or the Church Attorney may appeal to the Court of Review, by serving written notice of the appeal upon the Bishop Diocesan, with copies of the notice to the presidents of the Hearing Panel and the ~~Province~~ *Province President of the Court of Review*. The notice of appeal shall be signed by the Respondent's counsel or the

Church Attorney and shall include a copy of the Order from which the appeal is taken and state the grounds of the appeal.

EXPLANATION

The notice to the President of the Province made sense when we had provincial courts. Now that we have just one Court of Review that Court's President should be the person to receive notice of all appeals.

A077 Resolution Amending Canon IV.15.3 Provision to serve Notice of Appeal by Bishop Diocesan

Resolved, the House of _____ concurring, That the 80th General Convention amend Canon IV.15.3 to read as follows:

Any Order from a Hearing Panel finding that a Respondent did not commit an Offense involving a question of the Doctrine, Faith or Worship of the Church may be appealed by the Bishop Diocesan upon the written request of at least two Bishops Diocesan of other Dioceses within the Province who are not members of the Court of Review. Such an appeal shall be taken on the question of the Church's Doctrine, Faith and Worship only, and may not seek to reverse the finding of the Hearing Panel that Offenses were not committed. An appeal under this section may be taken by service of a notice of appeal by the Bishop Diocesan upon the Respondent, the Church Attorney and the presidents of the Hearing Panel and the *Province President of the Court of Review* within forty days after the Order of the Hearing Panel is received by the Bishop Diocesan.

EXPLANATION

The notice to the President of the Province made sense when we had provincial courts. Now that we have just one Court of Review the President of that Court needs to receive notice of all appeals.

DISCIPLINARY BOARD FOR BISHOPS

Membership

The Rt. Rev. Catherine Waynick, Convener	Eastern Michigan, V	2021
The Hon. Joseph Alarid	Rio Grande, VII	2024
The Rt. Rev. Mark Bourlakas	Southwestern Virginia, III	2024
The Rt. Rev. Jennifer Brooke-Davidson	Virginia, III	2024
The Rt. Rev. Wendell Gibbs	Michigan, V	2024
The Rt. Rev. Dena Harrison	Texas, VII	2024
The Rt. Rev. Dorsey Henderson, Jr.	Florida, IV	2021
The Rt. Rev. A. Robert Hirschfeld	New Hampshire, I	2024
The Rev. Canon Suzann Holding	Chicago, V	2021
The Rt. Rev. Herman Hollerith	Southern Virginia, III	2024
The Rt. Rev. Michael Buerkel Hunn	Rio Grande, VII	2021
The Rt. Rev. W. Nicholas Knisely	Rhode Island, I	2021
The Rev. Erik Larsen	Rhode Island, I	2021
The Rev. Mally Ewing Lloyd	Massachusetts, I	2024
Dr. Melissa Perrin	Chicago, V	2024
Mr. Marcellus Smith	Alabama, IV	2021
The Rev. Alistair So	Maryland, III	2024
Ms. Deborah Stokes-Wayne	Southern Ohio, V	2021
The Rev. Irene Tanabe	Hawaii, VIII	2024

Acknowledgements

Rt. Rev'd Todd Ousley serves as Intake Officer for the Disciplinary Board.

These terms of service will continue until the next General Convention has the opportunity to elect a class of members to replace the outgoing 2021 class.

Mandate

Canon IV.17.3-5

Sec. 3.

The Disciplinary Board for Bishops is hereby established as a court of the Church to have original jurisdiction over matters of discipline of Bishops, to hear Bishops' appeals from imposition of restriction on ministry or placement on Administrative Leave and to determine venue issues as provided in Canon IV.19.5. The Disciplinary Board for Bishops shall consist of ten (10) Bishops elected by the House of Bishops at a regularly scheduled session of General Convention, and four (4) Priests or Deacons and four (4) lay persons elected by the House of Deputies. All lay persons elected or appointed to serve shall be confirmed adult communicants in good standing. Members of the Board shall serve staggered terms of six (6) years, with terms of one half of the Bishops and one half of the lay persons, Priests and Deacons collectively expiring every three (3) years.

A vacancy among the member Bishops shall be appointed by the Presiding Bishop with the advice and consent of the Bishop members of Executive Council. A vacancy among the lay or Priest or Deacon members shall be filled by the President of the House of Deputies with the advice and consent of the lay, Priest and Deacon members of Executive Council. Unless elected or appointed to fill the remainder of an unexpired term, each member shall serve from the first day of January following the adjournment of the General Convention at which the member was elected, until the last day of December of the sixth calendar year following election and until the member's successor is elected and qualifies; however, there shall be no change in the composition of any Hearing Panel while a matter is pending unresolved before the Hearing Panel.

Sec. 4. Within sixty days following each General Convention, the Board shall convene to elect a president for the following triennium. The president shall be a Bishop. If there is no president, the Bishop who is senior by consecration shall perform the duties of the president.

Sec. 5. The Conference Panel shall consist of three Bishops, one Priest or Deacon and one lay person. The Hearing Panel shall consist of three Bishops, one Priest or Deacon and one lay person, except that the Hearing Panel for the Offense specified in Canon IV.4.1.h.2 pertaining to Doctrine Offenses shall consist of five Bishops only.

Summary of Work

We held several training sessions by phone and on line, particularly for the work of Conference and Hearing Panels.

As the work of the Board began in 2018, the case concerning Bp. J. John Bruno (Los Angeles) was still being considered. The Hearing Panel finished its work, and on December 26, 2018, issued an Order affirming a Sentence of Suspension for a period of three years, retroactive to August 2017, during which time Bp. Bruno was not to function in any way as a Bishop of The Episcopal Church.

Other concerns addressed by the Board during this triennium include the case of Bp. William Love (Albany), whose ministry had been restricted by the Presiding Bishop effective January 1, 2019. An Accord was reached and approved by the Disciplinary Board on October 21, 2020. Bp. Love resigned his jurisdiction on February 1, 2021, following a sabbatical leave in January of that year.

In July of 2020 an Accord was reached between the Presiding Bishop and Bp. Wayne Hougland (Western Michigan and Eastern Michigan, Provisional), and approved by the Board. The agreement called for a Suspension of episcopal ministry for the period of one year.

Each of these decisions was communicated to the mandated groups.

During this triennium three complaints were referred to conciliation, two were dismissed with appropriate pastoral response, and one was dismissed with the possibility for appeal to the President.

Funding for the ministry of the Disciplinary Board during this triennium has come from two sources:

- At the end of 2020 funds from The Episcopal Church had been expended in the amount of \$250,939.46,
- And from the Presiding Bishop's office in the amount of \$197,281.00, for a total of \$448,220.46.

This is a considerable decrease over the preceding triennium!

I cannot say enough about the dedication of the members of this Board; they are wonderful, and it has been a joy to serve with all of them.

EPISCOPAL RELIEF AND DEVELOPMENT BOARD OF DIRECTORS

Membership

Ms. Teri Lawver, <i>Chair</i>	New Jersey, II	2024
Ms. Shirley Allen	Texas, VII	2023
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2023
Mr. Michael Carscaddon	Atlanta, IV	2023
Mr. Miguel Escobar	Long Island, II	2022
The Rt. Rev. Mary Gray-Reeves	North Carolina, IV	2022
Ms. Sophie Hollingsworth	Massachusetts, I	2021
Mr. Kenneth Jones	Maryland, III	2023
Ms. Karen Longenecker	Rio Grande, VII	2023
Mr. John MacKinnon	New York, II	2021
Mr. David Martin	Iowa, VI	2022
Dr. Robert McCouch	Long Island, II	2023
Ms. Laura Ellen Muglia	Olympia, VIII	2021
The Rev. Steven Paulikas	Long Island, II	2023
The Rt. Rev. Wilfrido Ramos-Orench	Puerto Rico, IX	2022
Mr. Matt Silva	West Texas, VII	2024
Canon Rosalie Simmonds Ballentine	Virgin Islands, II	2021
Mr. N. Kurt Barnes, <i>Ex Officio</i>	New York, II	
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
Dr. Robert Radtke, <i>Ex Officio</i>	New York, II	
The Rev. Geoffrey Smith, <i>Ex Officio</i>	New Hampshire, I	

Changes in Membership

Mr. Daniel McNeel 'Neel' Lane, Chair - left in 2018, replaced by Ms. Teri Lawver, Chair
 Mr. Mark D. Constantine – left in 2019, replaced by Mr. Matt Silva
 The Rev. David C. Killeen – left in 2020, replaced by Mr. Kenneth Jones
 The Rt. Rev. Jeffrey D. Lee – left in 2020, replaced by The Rt. Rev. Jennifer Baskerville Burrows
 Ms. Chiseche Mibenge – left in 2019, replaced by Mr. Miguel Escobar
 The Rev. Canon Genevieve Razim – left in 2020, replaced by Mr. Michael Carscaddon
 Mr. Thomas W. Stoeber, Jr. – left in 2020, replaced by Ms. Karen Longenecker

Mandate

MISSION STATEMENT -- Episcopal Relief and Development is a compassionate response of the Episcopal Church to human suffering in the world. Hearing God's call to seek and serve Christ in all persons and to respect the dignity of every human being, Episcopal Relief and Development serves to bring together the generosity of Episcopalians and others with the needs of the world. --Episcopal Relief and Development faithfully administers the funds that are received from the Church and raised from other sources. It provides relief in times of disaster and promotes sustainable development by identifying and addressing the root causes of suffering. --Episcopal Relief and Development cherishes its partnerships within the Anglican Communion, with ecumenical bodies and with others who share a common vision for justice and peace among all people. Episcopal Relief and Development is a 501 (c)(3) non-profit organization closely affiliated with the General Convention of the Episcopal Church through our Board and staff relationships. A 21-person Board of Directors is responsible for governance of Episcopal Relief and Development. The Board includes both lay and clergy members who are nominated jointly by the Chair of the Board of the Corporation and the Presiding Bishop of the Episcopal Church, USA. Each director serves a three-year term.

Summary of Work

Core Values

As part of the Episcopal branch of what our Presiding Bishop, The Most Reverend Michael B. Curry, calls The Jesus Movement, seeking and serving Christ in all people near and far, everything we do and the way in which we do it is inspired by five core values:

Faith: Faith in Jesus is at the center of our mission as an organization. It gives us the power and the courage to follow Jesus' example by reaching out in compassion to serve the most marginalized and respond to human suffering.

Dignity: We respect the dignity of every human being, seeking and serving Christ in all people as they, in turn, empower themselves and transform the communities in which they live and work.

Relationship: Our relationships are the foundation upon which all our work is built. As we accompany and serve our partners, we nurture and sustain our relationships, thereby unlocking abundance wherever it may be.

Leadership: We lead through learning and collaboration, inspiring creativity and innovation in all aspects of our work and cherishing the many gifts God has given to our partners and to us.

Excellence: Being, doing, and giving our very best is how we are good stewards of God's abundance.

Every action we take is measured against these core values.

Our Program Approach

Our programmatic philosophy recognizes that genuine, sustainable change happens only when it comes from within an individual and within a community. Through our Asset-Based Community Development methodology, we never impose solutions; rather, we listen, learn and work together to build upon local knowledge and strengths that already exist. As a result, our partners and community members are able to live and sustain fuller, more productive lives. Our tag line reflects this programmatic approach: “Working together for lasting change.” Our programs impact the lives of over 3 million people annually.

Commitment to Disaster Preparedness and Response

Since our founding in 1940, as the "Presiding Bishop's Fund for World Relief" in the midst of World War II, we have been committed to providing disaster relief. To this end, Episcopal Relief & Development works with global Anglican partners to better prepare for and respond to disasters, whether natural or human-made. At the core of this goal is our Disaster Risk Reduction and Management Initiative and “Pastors and Disasters” tool-book of core competencies and standards, best practices and case studies. Our US Disaster Program connects, equips and inspires leaders of US dioceses to prepare for hazards that might affect their communities, to mitigate the impact of disasters, and to help vulnerable people make a full and sustained recovery. We have a full on-line resource library, network of diocesan disaster coordinators, expert volunteer consultants and regional trainings.

The Episcopal Asset Map, a joint project with The Episcopal Church, is a disaster preparedness tool that also provides a platform to highlight the ways Episcopalians are living out Christ's love in our communities. The profile for each congregation, school, or other Episcopal entity on the Map not only identifies its location and assets available in case of a disaster, it also tells stories of ministries at each location.

Global Development Priorities

We address the needs of communities around the world by focusing on three transformative priorities: Women, Children, and Climate.

Our work with Women focuses on helping communities promote the rights of women and children and move toward the vision that everyone deserves a life free from violence in a society where they are treated with dignity and respect. Only then can communities truly heal and thrive.

Our work with Children supports and protects kids under six so they reach appropriate health and developmental milestones. This focus on early development is foundational and critical to helping children achieve their full potential as future contributing members of their communities.

Our Climate-related work focuses on how families and communities can work together to adapt to the effects of rapidly changing weather patterns. This work includes preparing for and recovering from climate-influenced events such as floods, hurricanes and other disasters.

Sustainable Development Goals

The Sustainable Development Goals (SDGs) build on the work of the Millennium Development Goals (MDGs). Inspired by these global goals, all of Episcopal Relief & Development’s international development programs seek to mobilize local resources and expertise toward sustainable, community-led programs that address poverty, hunger, disease, gender inequality, access to clean water, inclusive and sustainable economic growth, sustainable agriculture, and climate resilience.

“Go with the people. Live with them. Learn from them. Love them. Start with what they have. Build on what they know. But with the best leaders, when the work is done, the task accomplished, the people will say, ‘We have done this ourselves’.” - Lao Tsu, Chinese Philosopher, 700 B.C.

FORWARD MOVEMENT

Membership

Mr. Miguel Escobar, <i>Chair</i>	Long Island, II
The Rev. Kate E. Wesch, <i>Vice Chair</i>	Olympia, VIII
Ms. Julie Thomas, <i>Treasurer</i>	Georgia, IV
Ms. Liz Bartenstein, <i>Secretary</i>	Virginia, IV
The Rev. Jean Beniste	Chicago, V
The Rt. Rev. Susan Brown Snook	San Diego, VIII
The Rev. Canon Victor Conrado	New York, II
The Rev. Albert Cutié	Southeast Florida, IV
The Rev. Ryan Fleenor	Connecticut, I
Ms. Kate Huston	Oklahoma, VII
Canon Clyde Kunz	Arizona, VIII
Ms. Lynne Jordal Martin	Connecticut, I
Mr. Jamie McMahon	Pittsburgh, III
The Rev. Dr. Joshua Samuel	Long Island, II
Ms. Anne Schmidt	Dallas, VII
The Bishop of Southern Ohio, <i>Ex-Officio</i> (vacant)	Southern Ohio, V
The Most Rev. Michael Bruce Curry, <i>Ex-Officio</i>	North Carolina, IV

Staff Management Team

The Rev. Canon Scott Gunn, Executive Director
Ms. Tania Z. Jones, Executive Assistant and Human Resources Specialist
Ms. Kathy Jose, Director of Business Operations
Ms. Miriam McKenney, Director of Development and Mission Engagement
Mr. Jason Merritt, Marketing Director
The Rev. Jay Sidebotham, Director of RenewalWorks
Ms. Richelle Thompson, Managing Editor
The Rev. Chris Yaw, Director of ChurchNext

Mandate

An agency of the Episcopal Church, Forward Movement was chartered by the 51st General Convention in 1934 “to reinvigorate the life of the church and to rehabilitate its general, diocesan, and parochial work.” Today Forward Movement’s mission is to “Inspire disciples. Empower evangelists.”

From its inception, Forward Movement has understood that for the Episcopal Church to be healthy, its congregations must be healthy. For congregations to be healthy, they must be filled with disciples rather than habitual Christians. Our work, then, is to encourage discipleship and evangelism.

Just over twenty (20) full and part-time staff members manage Forward Movement’s work, some stationed in offices in downtown Cincinnati and others around the United States. Together, we edit and design the publications, market them, fill orders, and respond to the diverse concerns of those who call and write with comments and questions. We welcome suggestions from congregations and readers on how we can be of more use and offer better service.

Summary of Work

Today, Forward Movement carries out its work in widely varied ways. We organize conferences, including Discipleship Matters and Evangelism Matters (offered in partnership with the Presiding Bishop’s Office). We offer free online resources, such as Grow Christians (www.growchristians.org), which encourages faith at home. For several years, we have worked with the Rev. Tim Schenck to offer Lent Madness (www.lentmadness.org), a fun, informative, and inspiring Lenten devotional. We have a full-time marketing team member focused on social media missioner on staff, part of whose responsibilities include posting inspiring and informational content on our social media channels and others.

Since Lent/Easter 2018, Forward Movement has worked with many organizations across the church to encourage Episcopalians to read whole books of the Bible together in a project called the Good Book Club. The Presiding Bishop has invited us all to go on this journey together. As of this writing, the most recent program was reading the Gospel of Mark during the Epiphany season 2021. Visit the Good Book Club website (www.goodbookclub.org) for free resources and details about how this project invites all Episcopalians and their congregations to take part.

In the print realm, we now focus on books, many of which offer opportunities for small group discussion and reflection. We seek to offer resources that encourage discipleship, whether through daily meditation or engagement with the richness of our prayer book tradition. We continue to offer

some pamphlets, the cutting-edge technology of our founding era in the 1930s, which continue to be useful in many congregations.

Material for Latino/Hispanic Episcopalians and seekers is an important part of Forward Movement's ministry. We have offered free resources, such as a guide for multi-cultural congregations who wish to celebrate *Las Posadas*. We have created new print and online resources. Our flagship devotional is available in Spanish as *Adelante día a día* in print, as an e-book, on social media, and in other channels.

Our first publication was a Lenten devotional focused on discipleship in 1935. *Forward Day by Day* was the immediate successor to that first publication and has been published continuously since then. Today *Forward Day by Day* is published as a print quarterly with a circulation of about 300,000 copies per quarter, over ninety (90) percent of which is in The Episcopal Church. We have subscribers around the world, with the largest number outside the U.S. going to the Anglican Church of Canada. In addition to print, the devotional is available as a podcast, in Braille, as an e-book, on a smartphone app, by e-mail, and through our social media channels (Facebook and Twitter). More than one hundred thousand (100,000) copies of *Forward Day by Day* – along with other literature – are distributed free of charge each year to prisons, military bases, hospitals, and nursing homes.

Podcasts are becoming increasingly important in our work. In addition to the *Forward Day by Day* podcast, we offer several podcasts of morning and evening prayer. We also offer seasonal and topical podcasts. As of this writing, we typically have up to 4,000 daily listeners.

We enjoy working with our partners. This work enables us and them to focus on core mission, collaborating for greater effectiveness. We now carry out work in collaboration with the Center for Biblical Studies, the Episcopal Church Center, the Episcopal Church Foundation, and Episcopal Relief & Development, among others.

Forward Movement operates RenewalWorks, a donor-funded ministry aimed at encouraging congregations to assess their spiritual health and vitality and to respond based on what they learn in their assessment. To date about 350 Episcopal congregations have undertaken this work, and a good deal of data on the spiritual health — and challenges — of The Episcopal Church have been amassed. Led by the Rev. Jay Sidebotham, RenewalWorks is expanding to offer more resources to congregations.

Forward Movement also operates ChurchNext, an online education ministry that serves approximately 24,000 registered learners. With more than 400 courses on offer, ChurchNext serves both individual subscribers as well as parish and diocesan partners. The pandemic saw engagement increase as more classes were offered, many of them for free. One of the most popular was “Civil Conversations in Uncivil Times” taught by Ray Suarez.

Forward Movement's offices are located in Cincinnati, OH, as they have been since our founding. The Executive Director, the Rev. Canon Scott Gunn, oversees a staff of over twenty (20) people, both full-time and part-time. While most staff are based in Cincinnati, there are also staff based in Alabama, Illinois, Michigan, North Carolina, Texas, and elsewhere in Ohio.

The Forward Movement Board of Directors meets twice each year. When we are not in a pandemic crisis, we meet most often in Cincinnati. Recent meetings have been held by videoconference. The Presiding Bishop serves as president of the Board and appoints its members.

To learn more about Forward Movement and its work, please visit www.forwardmovement.org. Early in its history, a collect for the ministry of Forward Movement was written, and we hope you will use it to pray for our ministry in the church and beyond.

O God, we ask your guidance and blessing for the Forward Movement of your church. Use it, we pray, to open our eyes to your glory and to the opportunities that lie before the church to reach people everywhere with the good news of Christ. Grant that the leaders of Forward Movement may be both wise and daring disciples and stir up in us the will to share joyfully in this work with our prayers and gifts. Let not our purpose grow slack, that the nations of this world may become one holy people under the kingship of God and of our Lord Jesus Christ. This we ask in His name. Amen.

Budget

The current combined annual budget is now about \$2.5 million, having been reduced from about \$3 million due to the global pandemic. Forward Movement is self-sustaining. Funding comes from sales, donations, grants, and investment income. The largest expense is personnel costs. Other major expenses include printing and publication purchase, warehousing and shipping, donations of materials, marketing, and general & administrative. No funding is requested from the General Convention budget.

GENERAL BOARD OF EXAMINING CHAPLAINS

Membership

The Rt. Rev. Larry Benfield, <i>Chair</i>	Arkansas, VII	2021
Ms. Anne LeVeque, <i>Vice-Chair</i>	Washington, III	2021
The Rt. Rev. Laura Ahrens	Connecticut, I	2021
Dr. Barbara Allison-Bryan	Virginia, III	2021
Dr. Liza Anderson	Minnesota, VI	2021
The Very Rev. Canon Michael Bamberger	Los Angeles, VIII	2021
The Rev. Dr. J. Barrington Bates	Newark, II	2021
The Rev. Dr. Canon Katharine Black	Massachusetts, I	2021
Ms. Beth Bojarski	San Diego, VIII	2024
The Rt. Rev. Thomas Breidenthal	Southern Ohio, V	2024
The Rt. Rev. Dr. DeDe Duncan-Probe	Central New York, II	2024
Ms. Rachel Erdman	Maryland, III	2024
The Rev. Dr. Thomas Ferguson	Massachusetts, I	2021
Dr. Norma Givens	Atlanta, IV	2021
The Rev. Miranda Hassett	Milwaukee, V	2024
The Rev. Adam Kradel	Pennsylvania, III	2021
The Rev. Calvin Lane	Southern Ohio, V	2024
The Rev. Milquella Mendoza	Dominican Republic, IX	2024
The Rev. Dr. Hugh Page	Northern Indiana, V	2021
Dr. Gregory Robbins	Colorado, VI	2024
Ms. Janet Roth	Oregon, VIII	2024
The Rev. Kara Slade	North Carolina, IV	2024
The Rev. Mark Story	Oklahoma, VII	2024
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Resignations in 2019: Dr. Barbara J. Allison-Bryan (Virginia, III, 2021), and the Rt. Rev. Dr. Dede Duncan-Probe (Central New York II, 2024).

Resignation in 2020: The Rt. Rev. Dr. Thomas E. Breidenthal (Southern Ohio, V, 2021)

The Board declined to fill four vacancies caused by a position left unfilled by the last General Convention and by the subsequent resignations of Dr. Barbara A. Allison-Bryan (Virginia, III, 2021), The Rt. Rev. Dr. Dede Duncan-Probe (Central New York II, 2024) and the Rt. Rev. Dr. Thomas E. Breidenthal (Southern Ohio, V, 2024).

Acknowledgements

The Executive Director, Secretary to the Board and GOE Administrator is Mr. Duncan C. Ely (Western North Carolina, IV).

Mandate

CANON III.15 Of the General Board of Examining Chaplains

Sec. 1. There shall be a General Board of Examining Chaplains, consisting of four Bishops, six Priests with pastoral cures or in specialized ministries, six members of accredited Seminary faculties or of other educational institutions, and six Lay Persons. The members of the Board shall be elected by the House of Bishops and confirmed by the House of Deputies, one-half of the members in each of the foregoing categories being elected and confirmed at each regular meeting of the General Convention for a term of two Convention periods. They shall take office at the adjournment of the meeting of the General Convention at which their elections are confirmed, and shall serve until the adjournment of the second regular meeting thereafter. No member shall serve more than 12 years consecutively. Additionally, the Presiding Bishop, in consultation with the Chair of the Board, may appoint up to four other members for a term. The House of Bishops, at any special meeting that may be held prior to the next meeting of the General Convention, shall fill for the unexpired portion of the term any vacancy that may have arisen in the interim. The Board shall elect its own Chair and Secretary, and shall have the power to constitute committees necessary for the carrying on of its work.

Sec. 2

a. The General Board of Examining Chaplains, with professional assistance, shall prepare at least annually a General Ordination Examination covering the subject matter set forth in Canon III.8.5 (g), and shall conduct, administer, and evaluate it in respect to those Candidates for Holy Orders who have been identified to the Board by their several Bishops.

b. Whenever a Candidate has not demonstrated proficiency in any one or more of the canonical areas covered by the General Ordination Examination, the General Board of Examining Chaplains shall recommend to the Commission on Ministry, and through the Commission to the Board of Examining Chaplains, if one exists, of the Diocese to which the Candidate belongs, how the proficiencies might be attained.

Sec. 3. The General Board of Examining Chaplains may prepare, in each Convention period, guidelines based upon the subjects contained in Canon III.8.5 (g), which guidelines shall be available to all persons concerned.

Sec. 4. The General Board of Examining Chaplains shall promptly report, in writing, to the Candidate, to the Candidate's Bishop and to the Dean of the Seminary the Candidate is attending, the results of all examinations held by them, together with the examinations themselves, whether satisfactory or unsatisfactory, making separate reports upon each person examined. The Bishop shall transmit these reports to the Standing Committee and to the Commission. Notwithstanding the results of the examinations, in no case shall the Standing Committee recommend a Candidate for Ordination under Canon III.8 until the Standing Committee has received from the Commission on Ministry a certificate to the effect that the Candidate has demonstrated a proficiency in all subjects required by Canon III. 8.5 (g) and (h). The report of the Board shall be made in the following form:

To _____ (candidate), the Right Reverend _____, Bishop of _____ (or in the absence of the Bishop the Standing Committee of) _____: (Place) _____ (date) _____
To the Dean of (Place) _____ (date) _____ We, having been assigned as examiners of A.B., hereby testify that we have examined A.B. upon the subject matter prescribed in Canon III.7. Sensible of our responsibility, we give our judgment as follows: (here specify the proficiency of A.B. in the subject matter appointed, or any deficiency therein, as made apparent by the examination. (Signed) _____

Sec. 5. The General Board of Examining Chaplains shall make a report concerning its work to each regular meeting of the General Convention, and in years between meetings of the General Convention shall make a report to the House of Bishops.

Summary of Work

The GBEC's 2019-2021 triennium has been one of creatively, innovatively and professionally carrying out its canonical responsibilities, including:

- Refined and continued through annual cycle of work:
 - March – May, with Question Writing Team recruitment and appointment;
 - June – September, with writing and refining questions and their scoring rubrics and with inviting nominations for candidates to sit for the GOE;
 - October – December, with vetting and adopting final questions and scoring rubrics; with continuing administrative work with nominated candidates and their seminaries and dioceses; with recruiting and appointing Evaluation Teams and finalizing evaluator training; and with preparing for the electronic administration of the GOE;
 - January – February with administering the exam; with training and qualifying evaluators; with answer evaluation, written feedback and providing results; and with administrative business such as invoicing.
- Completing long-range restructuring and transforming of all processes and structures under the guidance of its board, staff, professional educational testing consultants, technology professional, and others to:
 - Recruit volunteers;
 - Improve efficiency and volunteer training specifically in writing questions and evaluating examination answers;
 - Reduce expenses;
 - Provide a GOE that is responsive to TEC's changing needs;
 - Adhere to the latest and most professional psychometric standards for question creation, volunteer (especially evaluator) training and answer evaluation.
- Administered electronically an annual GOE at all Episcopal seminaries and at more than fifty additional locations throughout the United States and abroad in English and Spanish to:
 - 179 candidates in 2019
 - 179 in 2020
 - 179 (estimated in 2021)
- Evaluated GOE answers and reported the GOE results and recommendations to:
 - candidates
 - diocesan authorities
 - seminary deans (about results and how their candidates compared with those from other seminaries)

- Met at:
 - Annual Meetings of October 1-4, 2019 at Kanuga Conferences, Inc., Hendersonville, NC; November-December, 2020 via Zoom and other electronic means due to the pandemic; and October 2-5, 2021, at a location to be determined; to finalize and approve the GOE questions and scoring rubrics and transact other business;
 - Evaluation Meetings of February 18-21, 2019 and February 17-20, 2020 at Kanuga Conferences, Inc., Hendersonville, NC; and February 15-19 via Zoom and other electronic means due to the pandemic, to write evaluations of GOE answers.
- Fostered communication with constituents (bishops, candidates, dioceses, seminaries and TEC at large) via website and other electronic means such as:
 - Through GBEC Chair's annual letter to the House of Bishops;
 - Visits by Executive Director annually in 2019 and 2021 to nearly all Episcopal seminaries and other educational institutions with Episcopal students to meet with students, administrators and faculty, and via Zoom in 2020.
- Managed volunteer corps of about 100 people from throughout TEC by:
 - Recruiting, training, supervising and assisting volunteers in each annual cycle.
 - Utilizing annually about one hundred volunteers working electronically on:
 - Question Writing Teams
 - Field Testing Teams
 - Evaluation Teams
 - Editing and Office Teams
- Evaluated the GBEC's administration and processes (including question writing and answer evaluating) to:
 - Adapt and improve subsequent exams and procedures;
 - Improve volunteer administration and training.
- Received feedback from constituents, consultants, staff, board, other volunteers and people from the wider Church evidencing:
 - Timely distribution of GOE results;
 - High level of consistency in evaluations;
 - Efficient management;
 - Responsive communication.
- Continued to improve a dedicated website to:
 - Impart information about the GBEC and its ministry and the GOEs;
 - Receive nominations of people to take the GOE;
 - Transmit GOE questions, receive GOE answers and supply results to candidates, bishops and seminary deans;

- Improve communication and reduce to a minimum postage and printing costs;
- Maintain an extensive set of Frequently Asked Questions for electronic and print distribution to:
 - Describe the GBEC’s history and purpose;
 - Explain the GOE and its administration and evaluation;
 - Post tips for taking the exam;
 - Provide the past fifteen years of GOEs;
 - Make available to candidates interactive practice GOE questions.
- Maintained Standards for each of the six canonical areas:
 - Widely distributed them throughout TEC for feedback;
 - Published them on the GBEC website.
- Collected and published extensive annual statistics, a very basic example of which is:

2019 GOE	Overall				MDiv (Current/Former)				Diocese or Locally Trained			
	Proficient		Not Proficient		Proficient		Not Proficient		Proficient		Not Proficient	
Candidates	179				139				32			
Holy Scriptures	131	73%	48	27%	108	78%	31	22%	18	56%	14	44%
Church History	155	87%	24	13%	124	89%	15	11%	25	78%	7	22%
Christian Ethics	148	83%	31	17%	124	89%	15	11%	18	56%	14	44%
Practice of Ministry	129	72%	50	28%	102	73%	37	27%	19	59%	13	41%
Christian Theology	146	82%	33	18%	117	84%	22	16%	21	66%	11	34%
Christian Worship	157	88%	22	12%	124	89%	15	11%	25	78%	7	22%

2020 GOE	Overall				MDiv (Current/Former)				Diocese or Locally Trained			
	Proficient		Not Proficient		Proficient		Not Proficient		Proficient		Not Proficient	
Candidates	179				129				44			
Holy Scriptures	136	76%	43	24%	100	78%	29	22%	32	73%	12	27%
Church History	155	87%	24	13%	116	90%	13	10%	34	77%	10	23%
Christian Ethics	165	92%	14	8%	122	95%	7	5%	41	93%	3	7%
Practice of Ministry	155	87%	24	13%	118	91%	11	9%	35	80%	9	20%
Christian Theology	132	74%	47	26%	100	78%	29	22%	26	59%	18	41%
Christian Worship	150	84%	29	16%	115	89%	14	11%	29	66%	15	34%

2021 (not available by date of submission of this report)

Comments: The GBEC and its testing consultant consider a 75-80% proficiency rate an indication of a good GOE. The actual overall average proficiency rate is 83% for 2016 and 78% for 2017.

Goals and Objectives for the 2019-2021 Triennium

The GBEC's principal objectives during the next triennium will be to continue to fulfill its canonical responsibilities:

- Develop annually a General Ordination Examination;
- Administer it;
- Evaluate the answers;
- Report the results to candidates, their diocesan authorities and their seminary deans;
- Collate and report statistics and analysis.
- Institute surveys requesting feedback from all constituencies (bishops, candidates dioceses, seminaries and volunteers). at Kanuga Conferences , Inc., Hendersonville, NC

In addition, the GBEC plans to continue to:

- Create examinations that will provide diocesan authorities with useful information for diagnosis and assessment of their candidates;
- Provide seminaries and dioceses with statistics about performance on the annual GOE;
- Reduce costs, leverage resources, improve efficiency, increase use of electronic technology, and respond to the needs of TEC with a professionally designed and administered GOE;
- Refine and update the GBEC website to:
 - Reflect the GBEC's transparency about its work;
 - Allow easy access to information about the GBEC and the GOE;
 - Make the electronic administration of the GOE as user-friendly as possible.
- Build relationships by:
 - Committing to board development and training;
 - Collaborating with other church-wide, provincial and diocesan groups;
 - Working with Episcopal and other seminaries and educational institutions;
 - Communicating with bishops, students and their dioceses.
- Maintain detailed and extensive statistics for every annual cycle.

Budget

The GBEC reduced its meetings and their attendees by 80% and overall GBEC expenses by 80% (and office expenses by 90%) since the 2007-2009 triennium and raised the GOE fee from \$500 to \$750 in 2016. The GBEC has been self-sustaining for the last two triennia.

Description	2019-2021 GC Adopted	2019 Actual	2020 EC Adopted	2021 Approved	2021 Proposed	2019-2021 Act. 2019 Budget 2020-2021
Income	(\$396,000)				(\$396,000)	(\$396,000)
Non-Staff	\$128,747	\$44,740	\$42,916	\$42,916	\$40,916	\$128,572
Reserve for GC80	\$2,000					
Staff	\$305,777	\$94,866	\$100,278	\$104,834	\$102,540	\$297,684
Total	\$434,124	\$139,606	\$143,194	\$147,749	\$145,456	\$428,256

Board Travel and Meetings

The General Board of Examining Chaplains met three times during the triennium, requiring \$25,000 for 2019, \$25,000 for 2020 and \$25,000 for 2021, for a total of \$75,000 for the triennium.

OTHER REPORTS TO THE 80TH GENERAL CONVENTION

Presiding Officers' Advisory Group on Beloved Community Implementation

Report for the Presiding Bishop's Staff

PRESIDING OFFICERS' ADVISORY GROUP ON BELOVED COMMUNITY IMPLEMENTATION

Membership

The Rev. Edwin Johnson, <i>Chair</i>	Massachusetts, I	2021
The Rev. Meg Wagner, <i>Vice-Chair</i>	Iowa, VI	2021
Mr. Rob Corcoran	Texas, VII	2021
Ms. Holly Doll	North Dakota, VI	2021
The Rev. Canon John Kitagawa	Arizona, VIII	2021
Professor Brant Lee	Ohio, V	2021
The Rev. Canon Juan I. Marquez	Dominican Republic, IX	2021
Dr. Dora Mbuwayesango	North Carolina, IV	2021
Mr. Gary Moore	Central Gulf Coast, IV	2021
The Rt. Rev. Phoebe Roaf	West Tennessee, IV	2021
The Rev. Ema Rosero-Nordalm	Massachusetts, I	2021
The Hon. Byron Rushing	Massachusetts, I	2021
The Rev. Fabio Sotelo	Atlanta, IV	2021
The Rt. Rev. Andrew Waldo	Upper South Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-D002 Funding the Work of The Beloved Community

Resolved, the House of Deputies concurring, That the General Convention request that the Joint Standing Committee on Program, Budget and Finance allocate funding for the triennium for the implementation of additional work of organizing our efforts to respond to racial injustice and grow a Beloved Community of healers, justice makers and reconcilers for the implementation of this resolution; and be it further

Resolved, That such monies shall be utilized exclusively to make grants to agencies and dioceses and other affiliated entities of The Episcopal Church for the establishment of such programmatic activities aimed at addressing the issue of Racial Reconciliation. Such activities may include, but not be limited to, speaker series, sacred conversations, Racial Reconciliation Workshops, and other activities that promote the purposes of this resolution; and be it further

Resolved, That this General Convention directs, consistent with established policies and procedures, that The Executive Council be charged with the establishment of all criteria, and procedures associated with the awarding of such grants, and that such criteria and procedures be established as soon as practical, after the conclusion of this 79th General Convention such Committee or Office that Executive Council shall designate with implementation of the grants shall have published the criteria and be ready to accept applications submitted for such grants, and that the entities receiving such grants shall report back to the Committee or Office that Executive Council shall have designated on the usage of its grant, and that the Executive Council shall report back to the General Convention in 2021 on the usage of the funding allocation.

EXPLANATION:

The 78th General Convention of The Episcopal Church recognized, by the adoption of Resolution 2015-C019, that, despite repeated efforts at anti-racism training as well as racial justice and racial reconciliation initiatives—including the passage of more than 30 General Convention resolutions dating back to 1952, that the abomination and sin of racism continues to plague our society and our Church at great cost to human life and human dignity.

And, in the wake of the brutal, overtly racist murders of nine of our Christian brothers and sisters of Mother Emanuel African Methodist Episcopal Church on June 17, 2015; numerous inexcusable deaths of unarmed black men and youth at the hands of law enforcement personnel; and the moral atrocity of mass incarceration in which a hugely disproportionate number of persons of color have been unfairly caught in the net of an unjust criminal justice system, the 78th General Convention established as a top priority of The Episcopal Church in the upcoming triennium the challenging and difficult work of racial reconciliation through prayer, teaching, engagement, and action.

2015-C019 charged the Presiding Bishop, President of the House of Deputies, Vice President of the House of Bishops, and Vice President of the House of Deputies to lead, direct, and be present to assure and account for the Church's work of racial justice and reconciliation. They articulated a framework for that work, entitled *Becoming Beloved Community: The Episcopal Church's Long-term Commitment to Racial Healing, Reconciliation and Justice*, which directs additional work in the area of racial reconciliation.

As we head into this next triennium, we are faced with the realities of a resurgence of white supremacy, the increased normalization of personal and institutionalized fear of people of color, and overtly dehumanizing policies being enacted on refugees and immigrants—in addition to all of the injustices that prompted the 78th General Convention to pass 2015-C019.

We call upon our Church to make an investment of significant resources to hone in on and build capacity among our current and future leaders within The Episcopal Church in order to impact the practices of telling the truth, repairing the breach, practicing Jesus' way of love, and proclaiming the dream of Beloved Community.

In order to make our commitment to Becoming Beloved Community a reality in a world that desperately needs it, local churches, dioceses, and agencies must have the resources to engage this work in their contexts. We believe that these grants will make it possible for churches, dioceses, and other agencies of The Episcopal Church to begin to live into the commitment of the Church to Becoming Beloved Community in new and life-giving ways. In the same way that communities of practice have developed from the Genesis Church Planting grants that were given in the 2015-2018 triennium, we imagine that a network of grant recipients could develop to share best practices, resources, etc. among themselves and with the whole church. Provinces and dioceses that have been unable to afford to provide the canonically mandated trainings would be able to do so. These grants could also make it possible for the development of much-needed culturally appropriate and relevant resources that could be broadly shared with the church through the Absalom Jones Center for Racial Healing.

Summary of Work

Introduction

Greetings Church! We are the Presiding Officer's Advisory Group on Beloved Community Implementation. We were formed in January 2019 and were charged to offer our consult and collaboration around two major aspects of our Beloved Community Implementation: the distribution of grant funds and the convening of a Beloved Community Summit. These critical measures grew out of Resolutions 2018-D002 (Grant) and 2018-A228 (Summit) of the 79th General Convention in Austin, TX. Becoming Beloved Community is a long journey, a journey that spans years, decades and generations. Inspired by Jesus and moved by the Spirit, we've been called to rooted, radical, and collaborative action to move our church forward. In the words of Mordecai, we believe our Church has been called and prepared "for such a time as this" to bring our deep faith and wisdom to the work of becoming beloved community. Over the last two years we've partnered with Executive Council to disburse \$438,400 (plus an additional \$100,000 authorized by Executive Council) thus far and are in the midst of our third and final round of grants this triennium. When the pandemic forced us to postpone our long-planned in-person Beloved Community Summit and Conference (originally to take place May 5th-7th 2020), we convened a convocation across three evenings in July that drew well over 1000 participants from across the Church. More details about the grants, our grantees, our work of convening, and other work can be found below in our report, followed by our broader recommendations and resolutions.

May Summit & Conference Planning

While the previously mentioned in-person Summit in May did not happen, developments that occurred in its planning are worth mentioning. We had 38 confirmed speakers, presenters, and workshop leaders for the conference, which was to be held at the Cathedral in Minneapolis, Minnesota. Little did we know at the time that we were planning to descend upon a part of this country that would be so soon rocked by violence against black people. This diverse group included members of the different ethnic/racial groups, long-time and well-known champions for Racial Justice alongside new and emerging leaders, and our Presiding Officers. The first day, The Summit, was designed to bring together our grantees and other deeply committed leaders. The next two days were designed for a broader audience. The work of racial justice is some of the most difficult and isolating work there is, especially for the leaders. Our aim was to strengthen the movement by offering enrichment, inspiration and most importantly community and networking for those doing this work across the church. While we cannot determine where the Spirit will move us and the church, we are hopeful that such a gathering can be held in the triennium to come; and when it occurs, we are certain that it will both shake and strengthen our foundations as the Jesus movement for everyone.

Once we had determined that we would postpone the conference for a virtual one later on in the year, we held a virtual gathering of leaders, grant recipients, and long-time champions of racial justice on May 7th, what would have been the final night of the conference. Over 100 communities were represented, with our siblings from the Convocation of Episcopal Churches in Europe staying up until 2am to be with us. That gathering alone spawned new projects, new collaborations, and many of our strongest grant applications for the second round of grants.

July BBC Now Convocations

We held three virtual convocations the evenings of July 29th, 30th, and 31st. They came together to form “BBC Now,” and the days focused on Truth, Justice and Healing respectively. The inspiration for this particular focus came from work that Canon Spellers and the staff had done to sharpen their wider church response around Becoming Beloved Community during this tumultuous summer. The gatherings were overwhelmingly well-attended, with two of the three days eclipsing the limit of 1000 registrants and roughly 1600 unique participants engaging overall.

The day centered on “Truth” featured several speakers/presenters who highlighted the transformative power of truth-telling in their contexts. They offered strategies and approaches that created environments where those most impacted could share freely and the broader community could listen most closely. In the time that followed, small groups brainstormed together around ways to implement this in their ministry settings and communities.

The day centered on “Justice” highlighted several communities whose ministries were deeply interwoven with local movements for racial justice. In the midst of this previous summer's reckoning

around racial justice, they each provided unique methods and opportunities to work with and alongside the individuals, organizers, and groups in our midst. There was also a broader call and invitation to action together with the Absalom Jones Center for racial healing.

The day centered on “Healing” became a sacred space for all through a sacred healing circle. Seven persons from different racial and ethnic backgrounds, generations, and regions shared moving stories of their experiences of racism and their work around becoming beloved community. In addition to being a major blessing, this time also lifted up a model that our communities could use both during and beyond the pandemic to center marginalized stories and ignite the genuine reconciliation that our communities need.

At the end of our time we felt proud, blessed, and determined. We were proud to have pivoted so well in response to both the Covid-19 pandemic and the rising tide of racial tensions in the United States. Informed by this, we will strive to make subsequent in-person “hybrid” gatherings to continue to have such broad participation. We were blessed to have been able to build and establish new networks, the most essential goal for the Summit, and were blessed by the deep sharing and participation of registrants and presenters. Finally, we emerged determined to build on this momentum and move the work forward through our work of granting and gathering. While we have not completed the work of becoming beloved community, we took an enormous step forward with God’s help.

Report on Funding

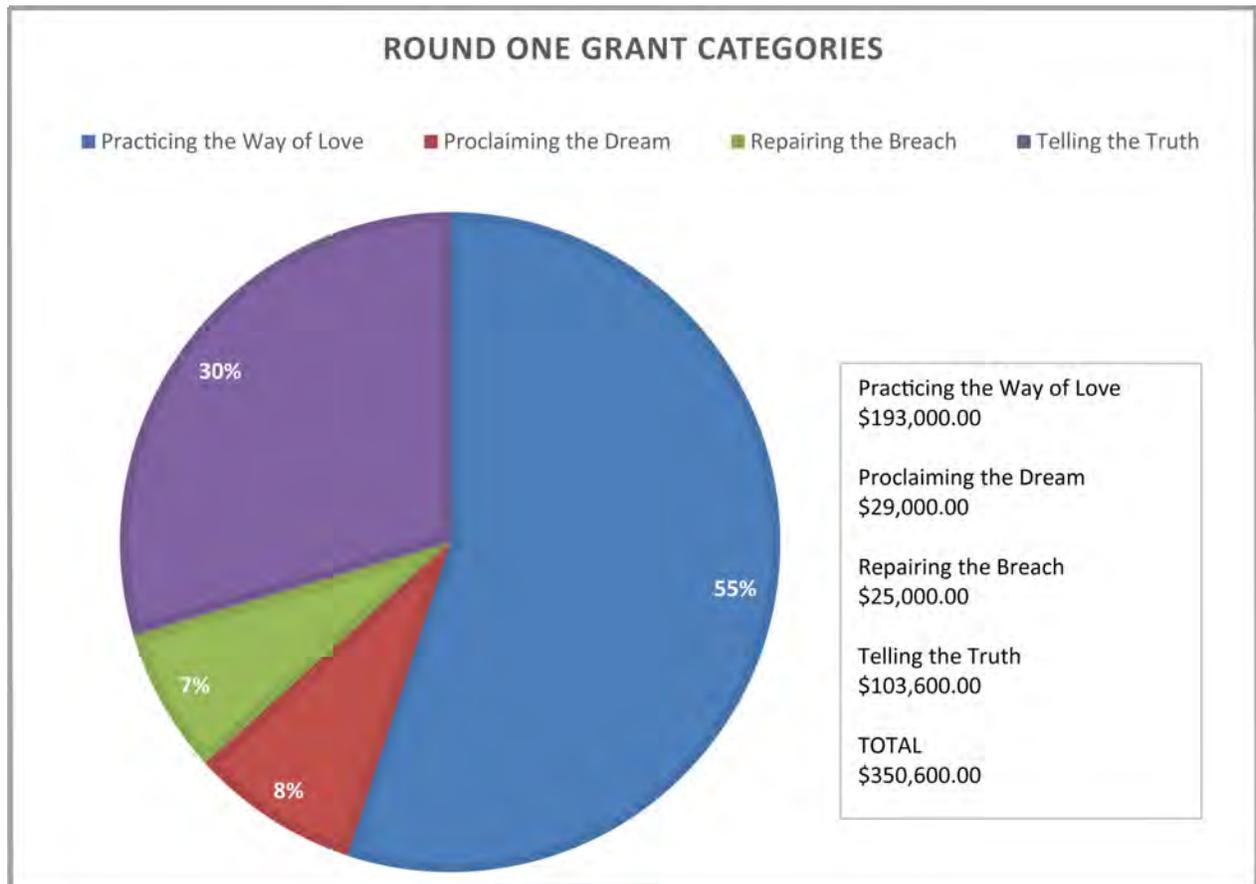
The triennial budget set aside \$750,000 for the fulfillment of resolutions 2018-D002 and 2018-A228. The Advisory Group approved \$350,600 in the first round of grants distributed in late Fall 2019. When the pandemic struck, we gave grantees an opportunity to extend their grant reporting and adapt or pause their plans as needed to ensure peoples’ safety. We held an online session in May for grant recipients and those who had planned to attend the Summit to share the challenges they were facing and how their plans were being altered.

As the pandemic raged on and its disproportionate toll on BIPOC communities became clear, and in the wake of the murder of George Floyd and the increased level of attention in the country to acts of racial violence, our second rounds of grants focused on providing a rapid response to those twin pandemics of COVID and racial violence. We approved grants totaling \$87,800 from our original grant funds plus an additional \$100,000 received from Executive Council for that purpose.

As of this report, we have spent \$2,117 on translation services for grant applications, summit materials, and press releases

Grant Reporting

In the first round of grants, we received 73 applications and awarded 42 grants totaling \$350,600. We offered two different grant types, Seed Grants (up to \$10,000) geared to groups launching new projects and/or evolving the scale of an existing project and Impact Grants (up to \$20,000) aimed primarily at growing capacity, impact and reach of communities and institutions already doing work to advance racial justice, healing, and reconciliation. In the first round we awarded 21 Impact Grants and 21 Seed Grants to 12 churches, 18 dioceses, 10 Episcopal organizations, one seminary, and the Convocation of Episcopal Churches in Europe.



Round One Grants went to:

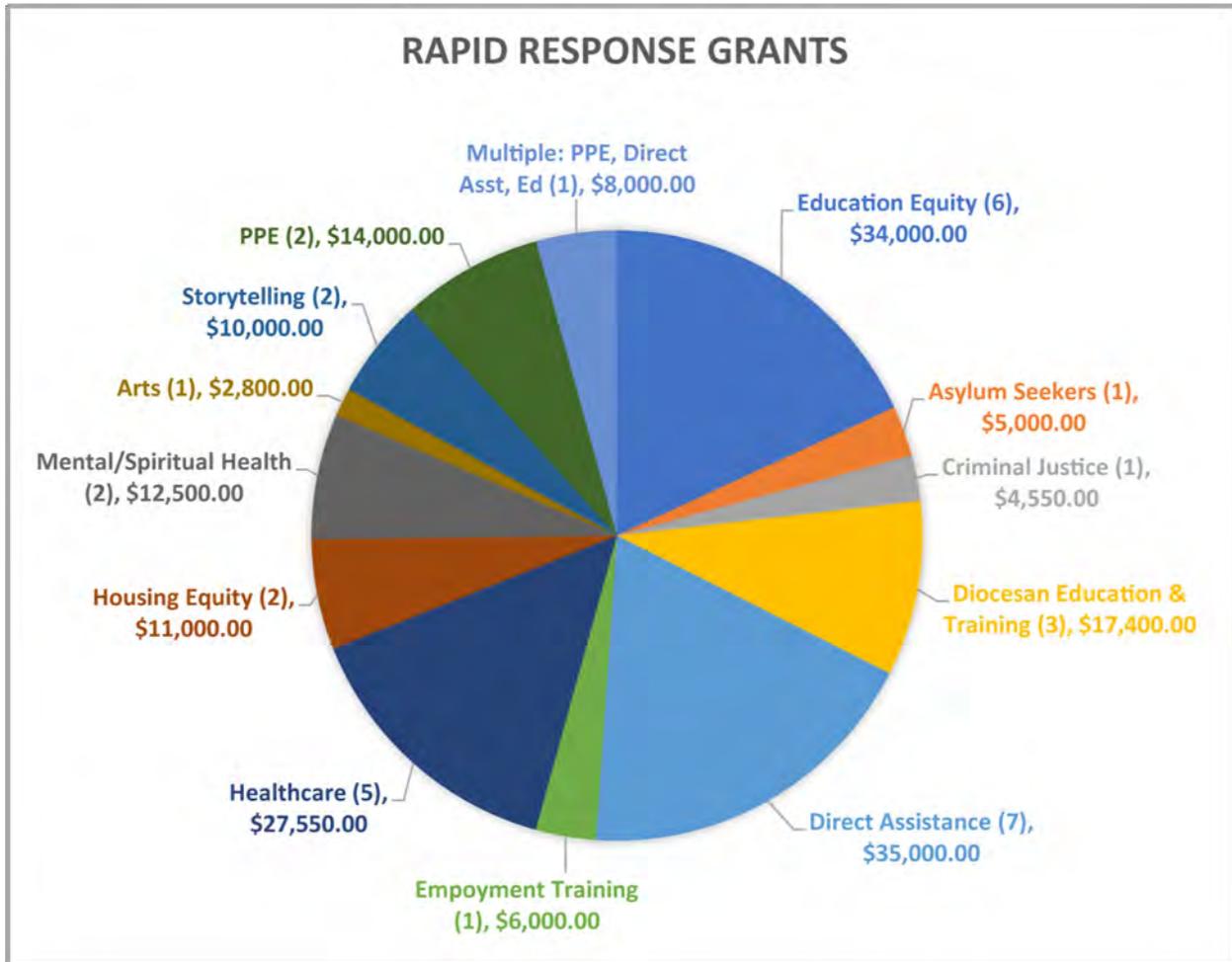
Groups primarily focused on or working with Communities of Color (12)	\$104,500.00
Dialogues/partnerships between Communities of Color and white Communities (7)	\$56,500.00
Churchwide/diocesan wide data gathering (3)	\$33,000.00
Primarily focused on education/training of White Communities to mobilize for justice (18)	\$131,600.00
Intercultural training for diverse organizations (3)	\$25,000.00
TOTAL	\$350,600.00

Rapid Response Grants

In 2020 we dispersed \$187,800 in Rapid Response Grants, thanks to an additional \$100,000 dedicated to this purpose by Executive Council. We received 99 grant requests and were able to fund 33 grants for groups working specifically to address the racial disparities laid bare by the coronavirus pandemic and for groups working to respond to racist violence and police reform. 21 of the grants went to churches, 7 to dioceses, 4 to Episcopal organizations, and 1 to a province. All proposed projects were required to demonstrate adherence to relevant local, diocesan and state public health guidelines for gathering and interaction.

Rapid Response Grants went to projects primarily serving these communities:

Black (8)	\$41,900.00
Black and Indigenous (1)	\$3,500.00
Indigenous (1)	\$9,000.00
Black and Latino/a/x (4)	\$23,000.00
Black, Indigenous, Hispanic, & Middle Eastern (1)	\$8,000.00
Black, Indigenous, & Latino/a/x (1)	\$9,000.00
Haitian (1)	\$6,000.00
Hispanic/Latino/a/x (5)	\$29,000.00
Immigrant/Refugee (1)	\$5,000.00
Mixed, with a majority of People of Color (10)	\$53,400.00
TOTAL	\$187,800.00



Plans moving forward

We have been energized by the work thus far and will continue our work up until the next General Convention. We are receiving proposals for the final round of grants and are leaning into partnerships to ensure even greater reach and diversity. We will be joining and hosting gatherings prior to the convention, including a series that will culminate at the convention itself. We will also be receiving, collecting, and sharing stories from grant recipients around their work and impact. This feels particularly important to us as this work must continue to multiply for us to be able to arrive at where God is calling us.

Beyond the next convention we are most hopeful that this work will root itself more deeply in the work of all the committees and commissions of the church. This is already happening with the audits and other reviews that have unfolded and we are excited to offer our guidance and companionship to all.

Some Words For The Church

The racial injustice and violence in this country has impacted us greatly. So many of us must worry for the health and safety of ourselves, of our children, and of our siblings in Jesus. The news cycle often does not bring us many signs of hope and yet our hope abounds. There are more people committed to this work in our church than we ever imagined. As such, if you find yourself alone, isolated, resisted and exhausted with this work please reach out to us. We are with you and we fully believe that together we can make it to the promised land.

Proposed resolutions

A100 Grants for Becoming Beloved Community

Resolved, the House of _____ concurring, that the 80th General Convention affirms that building the Beloved Community is a primary way this Church fulfills “the mission to restore all people to unity with God and each other in Christ” (Book of Common Prayer, page 855); and be it further

Resolved, that the 80th General Convention recognizes, affirms and encourages the pursuit of racial healing, justice and reconciliation being carried out in creative and powerful ways at the local level; and be it further

Resolved, that the 80th General Convention supports these local efforts with finances, and the human resources of the Church; and be it further

Resolved, that the 80th General Convention budgets the sum of \$400,000.00 to be administered by the Presiding Officers' Advisory Group for Beloved Community Implementation exclusively to make grants to churches, agencies, dioceses, and other affiliated entities of The Episcopal Church for the work of Becoming Beloved Community.

EXPLANATION

The grants made possible by 2018-D002 during the last triennium were impactful, and by the end of 2021 will have empowered over 100 ministries across the country. The grant-making process itself revealed a plethora of serious and creative initiatives to address racism in local communities. Funds granted made it possible for programs to get off the ground, or to be strengthened for greater impact. Because the process was not able to fund all the worthy applicants, it is clear that another pool of funds would be well utilized for the building of the Beloved Community.

A101 Virtual Gatherings with Ethnic Ministries

Resolved, the House of _____ concurring, that the 80th General Convention affirms that building the Beloved Community is a primary way this Church fulfills “the mission to restore all people to unity with God and each other in Christ” (Book of Common Prayer, page 855); and be it further

Resolved, that the 80th General Convention shall mandate the Presiding Officers’ Advisory Group for Beloved Community Implementation to work with each of the ethnic ministries of the Church to facilitate gathering local leaders of their communities in virtual convocations to dialogue about the specific ways systemic racism afflicts their communities, and to develop recommendations to the 81st General Convention for future actions to build the Beloved Community; and be it further

Resolved, that the 80th General Convention tasks the Presiding Officers’ Advisory Group for Beloved Community Implementation to report on these virtual convocations and their recommendations to the 81st General Convention; and be it further

Resolved, that the 80th General Convention budgets the sum of \$50,000.00 to fund these virtual

EXPLANATION

The Episcopal church has long recognized that racism is woven through the fabric not only of society but also the Church. The General Convention and the House of Bishops of the Episcopal Church have historically made strong statements condemning the sin of racism and promoting the building of the Beloved Community. It is understood that racism is not a binary Black-White issue. This resolution seeks to empower our diverse ethnic communities to gather to dialogue about the specific ways they experience oppression of systemic racism, and to give them voice to recommend concrete steps for building the Beloved Community.

A102 Virtual Gatherings with Interim Bodies and Other Ministries of the Church

Resolved, the House of _____ concurring, that the 80th General Convention affirms that building the Beloved Community is a primary way this Church fulfills “the mission to restore all people to unity with God and each other in Christ” (Book of Common Prayer, page 855); and be it further

Resolved, that the 80th General Convention shall mandate the Presiding Officers’ Advisory Group for Beloved Community Implementation to work with the Interim Bodies and other ministries of the Church to facilitate Virtual gatherings to dialogue about the specific ways systemic racism influences and afflicts ability to participate in building the Beloved Community through their ministries, and to develop recommendations to the 81st General Convention for future actions to build the Beloved Community; and be it further

Resolved, that the 80th General Convention tasks the Presiding Officers’ Advisory Group for Beloved Community Implementation to report on these virtual convocations and their recommendations to the 81st General Convention; and, be it further

Resolved, that the 80th General Convention budgets the sum of \$100,000.00 to fund these virtual gatherings.

Explanation

The Episcopal church has long recognized that racism is woven through the fabric not only of society but also the Church. The General Convention and the House of Bishops of the Episcopal Church have historically made strong statements condemning the sin of racism and promoting the building of the Beloved Community. Simply put, it is time to engage every aspect of the Church in meaningful dialogue about the ways racism afflicts its ministries, and to develop ways to address identified issues, all in an effort to build the Beloved Community.

REPORT FOR THE PRESIDING BISHOP'S STAFF

The Presiding Bishop is committed to a collaborative approach for strategizing and decision-making. Besides his work as chair of the Episcopal Church's **Executive Council**, he also chairs that body's **Executive Committee** (ECEC), which meets between Council gatherings as needed.

As president of the Domestic & Foreign Missionary Society, he confers regularly with his fellow DFMS Officers:

The Rev. Gay Jennings, President of the House of Deputies and DFMS vice president;
The Rev. Cn. Michael Barlowe, Secretary and Executive Officer of General Convention;
Mr. Kurt Barnes, Treasurer and Chief Financial Officer;
The Rev. Geoffrey T. Smith, Chief Operating Officer;
Mr. Kent Anker, Chief Legal Officer;

as well as his three Canons:

The Rev. Cn. C.K. Robertson, Ph.D., Canon for Ministry Beyond the Episcopal Church;
The Rev. Cn. Stephanie Spellers, Canon for Evangelism, Reconciliation, & Creation Care;
The Rev. Cn. E. Mark Stevenson, Canon for Ministry Within the Episcopal Church.

Together, these Officers and Canons constitute the **Executive Leadership Team**.

The Presiding Bishop likewise meets regularly with his **Chiefs & Canons**, who report directly to him and oversee much of the programmatic work of the DFMS. This group includes the three Canons, the CFO and COO, as well as:

Ms. Mary Kostel, Chancellor to the Presiding Bishop;
The Rt. Rev. Todd Ousley, Bishop for Pastoral Development.

He also confers respectively with those bishops who provide oversight on his behalf for ministries that come under his jurisdictional authority:

The Rt. Rev. Carl Walter Wright, Bishop Suffragan for the Armed Forces and Federal Ministries;
The Rt. Rev. Mark D. W. Edington, Bishop in Charge of the Convocation of Episcopal Churches in Europe;
The Rt. Rev. Robert L. Fitzpatrick (Bishop Diocesan of Hawaii), who on behalf of the Presiding Bishop provides oversight for the Episcopal Church in Micronesia.

Within the DFMS, the staff of the Presiding Bishop are organized under several areas, each overseen by its respective Chief, Canon, or Bishop. The remainder of this report lists those areas and their respective departments and highlights key accomplishments or efforts in this triennium.

Ministry Beyond the Episcopal Church

Ecumenical & Interreligious Relations

Support of dialogues with the [United Methodist Church](#), the [Presbyterian Church](#), the [Roman Catholic Church](#), and full communion partners ([Evangelical Lutheran Church](#) and the [Moravian Church](#)) in ongoing mission outreach and advocacy. The EIR office continues to hold active roles in conciliar bodies such as the [National Council of Churches](#), [Christian Churches Together](#), and the [World Council of Churches](#). We also work with the [Anglican Church of Canada](#), the [Evangelical Lutheran Church in Canada](#), and the Evangelical Lutheran Church in America—in what is now called “Churches Beyond Borders”—on seasonal devotions, advocacy, and issues of racial justice.

The EIR office is active in the NCC interfaith dialogues: Sikh, Buddhist, Jewish, Muslim, Hindu, and also with [Religions for Peace](#), [Shoulder to Shoulder](#), the [Anti-Defamation League](#), and the [National Religious Partnership for the Environment](#) in advocacy work, including initiatives against anti-Muslim and anti-Jewish bias. A General Convention Task Force is updating the Episcopal Church statement on interreligious engagement and [Guidelines for Jewish-Christian Relations](#).

During 2020, we have strengthened our Church’s public witness in the face of COVID-19 and racial injustice through deeper collaboration with ecumenical and interfaith partners, in coalitions such as [Christians Against Christian Nationalism](#), [Shoulder to Shoulder](#), the National Council of Churches’ [ACT now to End Racism](#), [Religions for Peace’s](#) work on Immigration and Refugees, and the UN’s engagement in human rights and the UNCSW. The EIR office serves as a resource for the Episcopal Church staff projects and dioceses as needs arise.

Global Partnerships & Mission Personnel

[The Partnership Officers](#) have continued to focus on enhancing relationships and strengthening our diplomatic presence across the Anglican Communion. During the pandemic, we experienced significant growth in collaboration and networking across the Communion.

Mission Personnel continues to be a valued source of goodwill ambassadors with both [Young Adult Service Corps](#) (celebrating its 20th anniversary) and [Episcopal Volunteers in Mission](#). In addition to international placements already in place, as a creative response to COVID travel limits we recently developed a new “Border Mission” initiative, partnering with dioceses at the US-Mexico border.

[The Episcopal UN office](#) continues The Episcopal Church’s [75-year engagement](#) with the United Nations, actively representing the Presiding Bishop and the Church on priorities such as creation care, racial reconciliation, sustainable development, human rights, gender equality, migration, and indigenous peoples.

Office of Government Relations (in DC)

Broad-based civic engagement in 2020 included partnership with the [2020 Census](#), election engagement, and ongoing work on [civil discourse](#).

Continued to serve as a resource for Episcopal leadership on all public policy and political issues. Continued to manage the [Episcopal Public Policy Network \(EPPN\)](#), the Church's grassroots network of Episcopalians committed to social justice advocacy, who sent more than 40,000 messages to Congress. Sent weekly [action alerts](#) based on General Convention and Executive Council resolutions, serving as a public witness for the Church.

Strategically built relationships with legislators, policymakers, and other key decision-makers to push for legislation and policies that protect the most vulnerable and the least of these. Conducted hundreds of meetings with Congressional offices each year and facilitated the passage of critical legislation.

Episcopal Migration Ministries

EMM's Engagement Unit has created an Episcopal Immigrant [Detention Ministry Network](#) and Episcopal [Asylum Ministry Network](#). These ministry networks are composed of individuals across the country who are directly involved in immigrant detention visitation programs, asylum seeker sponsorship, pastoral care for those in detention, border service programs, and more.

EMM's Engagement Unit has provided valuable [educational and advocacy resources](#) this triennium including: *Supporting Asylum Seekers: A Toolkit for Congregations*, *Hometown* podcast, *Love God, Love Neighbor: Education & Advocacy Training*, Webinars, and Book Discussion Guides.

EMM's government-funded [refugee resettlement program](#), administered by NYC program staff and carried out by local affiliates and volunteers, assisted 5,117 refugees with a safe and hopeful beginning in the U.S.

Ministry Within the Episcopal Church

Department of Faith Formation

Works to teach, train, and mentor leaders throughout the church by convening young adult leaders, campus ministers, youth ministers, and Episcopal Service Corps Program Directors for leadership development, networking, discernment, and support. Collaborates with people across the church to build and sustain relationships within the networks of leaders and possible partners, as well as advocates for and maintains the visibility and importance of youth and young adults. Partners with ministry leaders to curate and create resources. During the pandemic of COVID-19, creatively adapted how this work is done and how to best support the formation networks as ministry and mission continues.

Organized all aspects of several events, such as [Episcopal Youth Event](#), [Evento de Jóvenes Episcopales](#), annual [Young Adult & Campus Ministries Leadership conference](#), and [General Convention Official Youth Presence](#). Facilitated all aspects of nationwide recruitment, outreach, application, and network coordination for [Episcopal Service Corps](#).

Coordinated with, and provided counsel to, task forces and working groups on the following resolutions from General Convention 2018: 2018-A048, 1028-C014, 2018-A087, and 1028-C054.

Office for Transition Ministry

Worked with Board for Transition Ministry for implementation of relevant General Convention resolutions.

Supported hosting of meeting for church-wide Diocesan Transition Ministers (DTMs) in March 2019, who had not met together as a whole since 2007.

Supported bishops, diocesan staff, regional and provincial groups, clergy, lay leaders, seminaries and others on matters related to transition ministry. Keynote leader/speaker for multiple workshops and seminars. Provided specific COVID-19 support and training.

Continued work on updating user interface for Portfolio database; delayed released for pastoral reasons due to COVID-19.

Liaise with Bishop and Dioceses

Continuous collaboration for events including, but not limited to, consecrations, conventions, clergy conferences, revivals, and other official visits of the Presiding Bishop, allowing him to experience God's mission in the world, whether in a virtual or in-person capacity.

Coordinate regular weekly or bi-weekly resource-providing video conferences with the Bishops and Canons of the Church.

Successful implementation of a listserv for Canons to the Ordinary, to share resources and information and build relationships across the Church.

Liaise with Governing Bodies and Management Teams

Execution of virtual gatherings of the House of Bishops, including official meetings of the House of Bishops meetings and unofficial conversations with the Presiding Bishop and/or persons of interest.

Partner with the leadership of the House of Deputies and the General Convention Office to appoint members of Interim Bodies of General Convention (such as Standing Committees and Task Forces), and to provide counsel and resources for their appointed ministry.

Seek ways to integrate the Presiding Bishop's calling to The Jesus Movement and The Way of Love in the work of the wider staff of the DFMS.

Evangelism, Reconciliation, & Creation Care

Discipleship and The Way of Love

In 2018, during the 79th General Convention, we launched *The Way of Love: Practices for a Jesus-Centered Life*, a path and resources for Episcopal individuals, congregations and dioceses to intentionally grow disciples. The initiative has captured the energy and imagination of the whole church. Together with a working group, we continue to curate resources and efforts for the movement:

multiple curricula pegged to liturgical seasons, constituencies, and pandemic

an intentional small groups guide, webinar, and videos with Anglican partners

two video series (“[Traveling the Way of Love](#),” “[Explore the Way of Love](#)”)

a podcast (“[The Way of Love with Bishop Michael Curry](#)”)

webinars, [digital invitation kits](#), and many print and digital resources

Sharing the Way of Love, a campaign with the Development Office that has raised more than \$400,000 to support a set of initiatives that more effectively and broadly share the good news of God’s love

Evangelism

The Evangelism Team seeks to inspire and equip Episcopalians to seek, name and celebrate Jesus’s loving presence in their own and other’s stories, and to invite everyone to deeper relationship with God, via the following:

[Embracing Evangelism](#), a six-week video course on evangelism created in partnership with Virginia Theological Seminary

Nine [Episcopal Revivals](#) from Western Massachusetts to Wisconsin, and also “Holding on to Hope,” a national prayer service at Washington National Cathedral on Nov. 1, 2020 “attended” by more than 100,000

Coaching and training for dioceses, organizations, and congregations, including special sessions on digital welcome and incorporation; our flagship conference, [Evangelism Matters](#), joined forces with the Rooted in Jesus conference in 2019.

Evangelists network with thousands of members and newsletter

Racial Reconciliation

Our team worked with interim bodies, the [Mission Institute](#), and the [Center for Racial Healing](#) to inspire and facilitate engagement with [Becoming Beloved Community](#), the Episcopal Church’s comprehensive, long-term commitment to racial healing and justice:

Tell the Truth about Our Churches and Race: Conducted Racial Justice Audit of Episcopal Leadership with 1,300 leaders in key church-wide bodies and 23 dioceses to learn leaders' experiences of race and racism. See report here: www.episcopalchurch.org/racial-justice-audit.

Proclaim the Dream of Beloved Community: Launched [Sacred Ground](#) film-based race dialogue program, which as of December 2020 had organized nearly 1,400 circles and gathered 400 facilitators for training; also supported local church and civic partnerships and public witness.

Practice the Way of Jesus's Healing Love: Convened providers of [anti-racism/dismantling racism training](#) to share best practices and online strategies; improved communication about training opportunities across church.

Repair the Breach: Inventoried and creating network around diocesan racial justice engagement efforts www.episcopalchurch.org/racial-justice-audit; convened Criminal Justice Ministries Roundtable

Ongoing work: Strategic coaching and workshops with dioceses, cathedrals, seminaries, and other organizations; [Prophetic Voices](#) preaching podcast; regularly updated [online resource hub](#); critical support to Presiding Officers' Advisory Group on Beloved Community Implementation (including [webinar series](#) and grants program), Executive Council Committee on Anti-racism and Reconciliation, House of Bishops, and other bodies.

Highlights from the [Absalom Jones Center for Racial Healing](#):

Dismantling racism workshops, racial healing conversations, memorials and services to remember the lynched, justice pilgrimages, programs with local HBCUs, an International Women of Color and Wellness conference

Founded the Bishop Barbara C. Harris Justice Project, began Reimagining Policing initiative, formed partnerships with three seminaries to enhance dismantling racism curricula, developing culturally appropriate curricula for Latinx and young peoples

Reconciliation, Justice and Creation Care (RJCC)

The Department of Reconciliation, Justice and Creation Care takes an intersectional approach to justice across the fields of race, creation care, domestic poverty. In addition to Racial Reconciliation and Creation Care ministries, we did the following:

Built strong Episcopal presence within the [Poor People's Campaign](#); convened and encouraged leaders – especially [Jubilee Ministries](#) – engaged in hunger and anti-poverty work amid COVID-19 pandemic

Launched online version of [Called to Transformation](#), the Asset Based Community Development curriculum; includes trainer training with Iona School.

Developed [social justice engagement tools and networks](#) to strengthen Episcopal public witness and advocacy during 2020 uprisings and election season.

Care of Creation

The [Creation Care team](#) includes staff across several departments, and partners in the [Task Force on Creation Care and Environmental Racism](#) and the Diocese of California. Together we promote formation and advocacy, so churches, dioceses, and individuals grow in love for God's creation and live humbly on the earth. Here are just a few triennial highlights:

Developed Episcopal strategy, messaging, and covenant for creation care.

Engaged more than 1,400 people through Creation Care Pledge and Covenant.

(Diocese of California) Launched [carbon tracker](#) and supportive network via "Sustain Our Island Home."

Supported regional networks with provincial calls and newsletter, launched "[Good News Gardens](#)" (with Evangelism), and expanded online resource hubs.

Offered important witness and advocacy with [federal government](#), United Nations, Anglican Communion, and other ecumenical and civic forums.

Church Planting and Congregational Redevelopment

Our [ministry team](#) provides church-wide consulting and guidance to dioceses and congregations, with special attention to innovative congregational responses to pandemic and systemic racism.

Migrated all trainings and consultations online, totaling nearly 1,400 individual and group sessions in 2019-2020.

With Task Force, administered [grant program](#) that awarded nearly \$3 million.

Partnered with Task Force, Executive Council, seminaries, and ecumenical partners to develop the [Genesis II](#) network and processes supporting congregational redevelopment for the sake of launching new ministries.

Ethnic Ministries

In the midst of pandemic, the Offices for [Latino](#), [Black/African Diaspora](#), [Asiamerica](#), and [Indigenous Ministries](#) have led the way with virtual church-wide conferences, webinars, training events, coaching, network gatherings and formational programs.

Widened and strengthened relationship with churches outside the U.S., especially in Provinces 2 and 9, and expanded our working relationships with institutions, seminaries, and organizations; also fostered collaborative relationship with DFMS partners in Faith Formation, Church Planting, Government Relations, Global Partnerships, Reconciliation, Justice & Creation Care, and more.

Continued to offer consultations on church-wide, diocesan, and congregational levels around church planting, evangelism, congregational vitality, advocacy, racial injustice, and inequality.

Operations

Facilities & Real Estate

100% of the vacant office and retail space at 815 Second Avenue has been successfully leased, generating in 2021 \$3.4 million in rental income that will more than offset \$2.8 million in utility and facility management costs.

With the leasing of the retail space on the ground floor and mezzanine of 815 Second Avenue, the DFMS is constructing large conference space and a video production studio on the 5th floor that will be ready in 2021.

We continue to improve building efficiency and reduce our carbon footprint, raising our EPA energy star rating from 72 to 78, securing fixed bulk electricity rates for 100% green energy, and performing energy audits to identify and steadily improve efficiency.

With Corona virus lockdowns in New York City, Washington, DC, and Austin, Texas, the DFMS offices are closed until further notice. Appropriate steps have been and continue to be taken to ensure all facilities comply with local and state health regulations and codes, and proper screening and contact tracing protocols are in effect both for the DFMS and our building tenants.

With the Seminary of the Southwest closing its library in mid-2021, the COO has been authorized to secure an interim home for the Archives of the Episcopal Church main site in Austin, Texas. Competitive negotiating is underway with landlords to secure a site that meets the requirements set forth by the Archives Board and the Executive Council.

Human Resources

Development of an annual performance appraisals system for all DFMS employees. This system is updated every year with new questions related to current environment.

Provided management and supervisory training to all managers, directors, chiefs and canons. The training provides all a base-line approach to conducting performance reviews, setting goals and objectives, handling the “difficult” conversations, and other approaches to effective management.

Prepared and completed a comprehensive welcoming video describing the role and functions of the DFMS, GCO, and House of Deputies to staff and new hires as part of their orientation. This video is critical in times when physically gathering and meeting is impossible.

Information Technology

The Information Technology Department reduced IT spending for the 79th General Convention by more than 40% vs. the 78th convention while providing a level of service which was noted as “much improved” by the General Convention Office.

The IT department rebuilt the IT network for our main office facility in New York as well as all other remote offices operated in the Washington and Virginia areas. This included installing new firewalls

and security devices, increasing network bandwidth, installing reliable Wi-Fi equipment for 100% coverage, improving interdepartmental communications through Microsoft 365 & Teams.

IT Support Service has improved dramatically over the last 3 years by training help desk staff as well as implementing a help desk ticketing solution to ensure all issues are followed up and resolved in a timely manner.

Application development has improved with changes to our development methodology, faster development cycles and more secure rollouts of applications.

IT has partnered with the Office of Communications to lead the organization for web hosting, infrastructure, web technology strategy and security, allowing Communications to focus on design and content. We are in the process of upgrading the episcopalchurch.org website to allow for faster development, changes to look and feel and upgrades to existing web sites. This change will also result in significant cost savings in managing and maintaining these sites. This work is 85% complete.

Communications

The Episcopal News Service has grown its website audience from 612,000 in 2019, to over 1.6 million through September 2020, and now has over 21,000 daily news email subscribers, over 20,000 subscribers on Facebook, and over 20,000 on Twitter. ENS serves both a core Episcopal audience, and increasingly serves as a source of accurate information cited by religious and secular media, including CNN, MSNBC, and Fox News.

The Public Affairs staff's role is to consult and implement a communications strategy, acting as a trusted advisor to the Presiding Bishop and Church staff. Since Presiding Bishop Curry's preaching at Royal Wedding in 2018, they have successfully managed a high media interest from the religious and secular press. Bishop Curry has been an often-requested presence on national media through the coronavirus pandemic and during the early days of the BLM movement when his message of love and calming presence have been especially needed.

As churches were forced to close their doors during the pandemic, the production of video, podcast, and website content has become a critical communications link throughout the Episcopal Church. The Creative Services team that does this work has seen its audience grow exponentially, to 3.6 million video plays, 11,000 podcast listeners per month and 192,000 podcast downloads in 2020.

The construction of a video production studio at 815 Second Avenue will enable the Creative Services team to greatly improve its video production schedule at a lower cost, and (once the pandemic is behind us) enable the staff to train and share this resource with congregations and dioceses looking to improve their video and podcast production capabilities. This studio will be ready for use in early 2021.

Finance and Development

Treasury

Majority of payment transactions done without paper checks.

Regularly assisted parishes seeking confirmation of tax-exempt status.

Controller

Clean audits of financials in each year.

Virtually paperless operations in view of pandemic disruptions.

Investments

Increased number of parish and diocesan co-investing in the trust funds.

Continued top-tier performance of the trust funds with annual long-term performance exceeding 8% after all fees and expenses.

Development

Annual Appeal exceeded goals each year.

Increased mailing list from 20,000 names to nearly 100,000.

Successfully completed campaigns to support Cuba clergy pension funds; Sharing the Way of Love.

Assisted campaigns to support Episcopal Migration Ministries; Historically Black Colleges; Navajoland; Sharing the Way of Love.

Office of Pastoral Development

Episcopal Transitions

Assisted Bishops and Standing Committees in developing and executing plans for bishop transitions.

Coordinated group of trained Episcopal Transition Consultants with key assistance from Judy Stark, senior consultant.

Jointly-facilitated consent process for bishops with General Convention Office and Presiding Bishop's Office.

Worked extensively during this triennium with General Convention Task Force to Assist the Office of Pastoral Development to enhance the work in bishop transitions. This work included enhancing medical and psychological assessments of bishop nominees, developing online materials for individuals discerning a call to the episcopate, developing a database of discernment coaches and program offerings, and suggested canonical changes.

Worked with dioceses in discerning individuals to be called as Bishops Visiting, Assisting, Assistant, or Provisional.

Counseled retired bishops on opportunities for continued service to the Church.

Served on faculty of College for Bishops programs: New Bishops & Spouses Conference and Orderly Transitions Conference.

Reconciliation and Conflict Transformation

Served as Intake Officer for Title IV matters concerning bishops.

Coordinated responses, with Chancellor to the Presiding Bishop, Title III reconciliation and/or dissolution processes between bishops and dioceses.

Continued to explore with lay and clergy leaders across the Church, movement toward more broad-based restorative justice practices.

Pastoral Care

Worked with House of Bishops Committee on Pastoral Development, under the leadership of the Rt. Rev. Gayle Harris (Suffragan, MA).

Served on House of Bishops Planning Committee.

Served as Presiding Bishop's liaison to Spouses of Bishops Planning Group.

Continued to develop chaplain corps for retired bishops, spouses, and families.

Office of Armed Forces and Federal Ministries

Administration of Chaplaincies

Provide administrative support and pathways of discernment of chaplaincy to postulants, seminarians, and priests as they apply for chaplain positions within the Department of Defense Institutions.

Administrative support for current chaplains to keep professional credentials current and to assist in times of ministry transition, such as returning to parish ministry or retirement.

Disaster Preparedness – *Episcopal Federal Chaplain Support*: Distributed to all Episcopal dioceses the names of Episcopal Federal Chaplains (i.e. Active duty, Reserves, National Guard, Civil Air Patrol, Federal Prisons, Veterans Affairs, et.al.) who are assigned and serving within the boundaries of each diocese. The list will be updated annually.

We currently have 125 chaplains on our roster. There are eighteen individuals at various stages in the application process who are seeking endorsement for Federal Chaplaincy by the Bishop. In 2020 we

have interviewed 15 individuals and endorsed 14. We have had ten chaplains access onto either active or reserve status. We have had three retirements and one death of a Reserve Chaplain.

Pastoral Support of Chaplains

Visits to chaplains in their duty stations. Much like parish visits, these provide opportunities for the Bishop to better guide chaplains in their careers and encourage them in their ministry. The Bishop also gains insight of the current issues and trends in DoD facilities.

Regular Episcopal pastoral letters and sermons are sent out to chaplains and partners in ministry.

The 2020 global COVID-19 pandemic severely curtailed Bishop Wright's movements. Most visitations were done remotely by phone calls, emails, ZOOM meetings. During this reporting period, Bishop Wright had telephone contact with more than one hundred of our chaplains. More were contacted by email.

Training and Professional Development

Constable Grant Award, Standing Commission on World Mission – *Military Chaplains Just War Education Project*: Fulfills resolution General Convention Resolution 2015-A048, "Study the Application of Just War Principles to the Current Practice of Warfare" to advance the study of Just War principles. Materials developed will be used in formation of The Episcopal Church's military chaplains for meeting the pastoral needs of current members of the Armed Services and veterans, including those coping with moral injury and other forms of combat-related trauma.

Virtual Training Symposium on September 25th, 2020. Gathered 80 chaplains for a day of training and collegial opportunities.

Twice annual mandatory ministry reports from chaplains keep our office apprised and in touch.

Episcopal Responsibilities with the National Church, National Profile

Participation in national events, such as Memorial Day, Veterans Day, military celebrations, and state funerals.

Clergy participation in Washington National Cathedral Veterans Committee and for special services, like the "Blessing of the Bikes" for Rolling Thunder each Memorial Day Weekend.

Maintain high visibility with the professional chaplains organizations: NCMAF, MCA, and endorsing peers.

The Episcopal Church

Reports to the

80th General Convention

Otherwise known as

The Blue Book

Volume 2



Reports of the Committees, Commissions, Agencies, and Boards to
The General Convention of The Episcopal Church
Baltimore, in the State and Diocese of Maryland
July 7th – 14th, 2022

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Office of the General Convention

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JOINT STANDING COMMITTEE REPORTS

Joint Standing Committee on Nominations

Joint Standing Committee on Nominations Report

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Nominees – Church Pension Fund Trustees

Nominees – Court of Review

Nominees – Disciplinary Board for Bishops

Nominees – Executive Council

Nominees – General Board of Examining Chaplains

Nominees – Trustees of the General Theological Seminary

Nominees – Joint Nominating Committee for the Election of the
Presiding Bishop

Joint Standing Committee on Planning and Arrangements

Joint Standing Committee on Program, Budget and Finance

JOINT STANDING COMMITTEE ON NOMINATIONS

Membership

Mr. Scott Haight, <i>Chair</i>	West Tennessee, IV	2021
The Rt. Rev. Steven Miller, <i>Vice-Chair</i>	Milwaukee, V	2021
The Rev. Tracie Middleton, <i>Secretary</i>	The Episcopal Church in North Texas, VII	2021
The Hon. Joseph Alarid	Rio Grande, VII	2021
The Rev. Canon Dr. Lynn A. Collins	Long Island, II	2021
Ms. Nanci Gordon	Vermont, I	2021
Mrs. Toni Hogg	Southern Virginia, III	2021
The Rt. Rev. Rafael Morales	Puerto Rico, IX	2021
Ms. Kathryn Nishibayashi	Los Angeles, VIII	2021
Mrs. Erica Pomerenk	Colorado, VI	2021
The Rt. Rev. Audrey Scanlan	Central Pennsylvania, III	2021
The Rt. Rev. Dabney Smith	Southwest Florida, IV	2021
The Rev. Rachel Taber-Hamilton	Olympia, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

During the triennium, there were two changes in membership: In November of 2019, the Rt. Rev. Victor A. Scantlebury and the Rt. Rev. William Jay Lambert, III were replaced on the committee by the Rt. Rev. Audrey Scanlan and the Rt. Rev. Rafael Morales.

Representation at General Convention

Bishop Rafael Morales and Deputy Scott Haight are authorized to receive non-substantive amendments to this Report at General Convention.

Mandate

JOINT RULES VII. 17-22

17. There shall be a Joint Standing Committee on Nominations, which shall submit nominations for the election of:

- a.** Trustees of The Church Pension Fund, serving as the Joint Committee referred to in Canon I.8.2.
- b.** Members of the Executive Council under Canon I.4.1.d.
- c.** The Secretary of the House of Deputies and the Treasurer of the General Convention under Canons I.1.1.j and I.1.7.a.
- d.** Trustees of the General Theological Seminary.
- e.** General Board of Examining Chaplains.
- f.** Disciplinary Board for Bishops.

18. The Joint Standing Committee on Nominations shall be composed of three Bishops, three Presbyters, and six Lay Persons. Members who are Presbyters or Lay Persons shall have served as deputies to the most recent General Convention and will continue to serve as members of the Joint Standing Committee until the next General Convention.

19. The said Committee is instructed to solicit recommendations from interested organizations and individuals, to be considered by them for inclusion among their nominees.

20. Except for the Secretary of the General Convention and the Treasurer of the General Convention, the said Committee is instructed to nominate a number, equal to at least twice the number of vacancies, which shall be broadly representative of the constituency of this Church; to prepare biographical sketches of all nominees; and to include such nominations and sketches in the Blue Book, or otherwise to circulate them among Bishops and Deputies well in advance of the meeting of the next succeeding General Convention; this procedure, however, not to preclude further nominations from the floor in the appropriate House of the General Convention.

21.

a. The Joint Standing Committee on Nominations, through the Office of the Secretary of General Convention, will secure background checks on its and any other nominees for Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund. These background checks will cover criminal records checks and sexual offender registry checks in any state where a proposed nominee has resided during the prior seven (7) years, any appropriate professional licensing bodies with jurisdiction over a nominee's professional status and any violations of state or federal securities or banking laws. The records checks of proposed nominees from

outside the United States will cover the same information from comparable authorities in the place of principal residence of the proposed nominee.

b. The required background check will be done prior to accepting a proposed nomination.

c. Background check results will be reviewed by the Office of the Secretary of General Convention. If that Office, after consultation with the Chief Legal Officer, determines that the results should preclude a person from holding the office sought, the Office shall share the determination with the proposed nominee and remit that determination, but not the background check results, to the nominating authority. Background check information shall not be shared beyond the Office of the Secretary of General Convention, the Chief Legal Officer, and proposed nominees who request their own information. The cost of background checks under this rule shall be covered by the General Convention budget.

22. Any person desiring to be nominated for any of the offices of the Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund shall, at a time determined by the Joint Standing Committee on Nominations, but no later than four (4) months prior to the start of General Convention, submit the person's application to the Joint Standing Committee on Nominations for the purpose of submitting to a background check.

Summary of Work

The Joint Standing Committee on Nominations accomplished its work in one in-person meeting, in November 2018 at the Maritime Institute in Linthicum Heights, MD; and in 10 online virtual meetings from March 7, 2019 to October 14, 2020, via the Zoom platform, because of restrictions on in-person meetings in response to the COVID-19 pandemic. Electronic communications on the GCO Extranet system assisted the Committee throughout the triennium.

During the initial meeting, officers were elected, Joint Rules for the Nominating Committee were reviewed, clarification was made regarding eligibility of the Committee's own members to apply for nomination (but not to participate in any decisions regarding the slate for the position for which they applied), and a timetable for the nominating process was developed. The Committee also approved a requirement that all applications be submitted electronically through forms made available on the General Convention's website in English, Spanish, and French.

The Committee sought updated position descriptions from the various elective bodies for whom we are nominating candidates: The Board of Trustees of General Theological Seminary, the General Board of Examining Chaplains, the Disciplinary Board for Bishops, the Board of Trustees of the Church Pension Group, the Executive Council, and the Joint Nominating Committee for the Election

of the Presiding Bishop, as well as one new body: the Court of Review, created at the 79th General Convention in 2018 in Austin, TX. We also looked at the qualifications for the election of the Secretary and Treasurer of General Convention.

The application process again used an electronic application form which allowed the applicants to submit their application online and upload a photo with it to complete the process. This ensured consistency and controlled the maximum allowable length of the biographical information. Notice of the application process and timing was announced through Episcopal News Service and various email lists.

The Committee set an initial deadline of March 1, 2020, for receiving all applications. The deadline was moved back to May 31, then to July 15, and finally to August 1 for a few positions. Subcommittees were created to seek nominees and later evaluate applications: (1) Church Pension Group; (2) Executive Council; (3) the Boards; and all members of the committee helped to recruit and evaluate applications for the Joint Nominating Committee for the Election of the Presiding Bishop. Each group was tasked with reviewing and screening applications for their respective body. Members used a common digital evaluation form. At the October 2020 meeting, Committee members reviewed evaluations within sub-groups to finalize each slate.

The draft slates provided by the sub-committees were then voted upon and endorsed by the full committee membership for inclusion in our report to the General Convention.

The list of nominees was finalized pending acceptance by candidates. Letters of appreciation were sent to all applicants. The Committee was impressed by the many applications received from highly qualified and committed individuals. The criteria for decisions were based on qualifications for the particular position, diversity, and geographic distribution. In addition, each applicant was assessed for compliance to the Church's mandate for anti-racism training.

The slate of nominees reflects the needs of The Episcopal Church as the Committee perceives them at this time; the Committee is pleased to place in nomination for balloting at the 80th General Convention the names following this Report.

The committee notes that for some of the positions, we did not receive nominations from all Provinces of this Church. We encourage the Presiding Bishop and the President of the House of Deputies to use their appointive powers to ensure that all Provinces are represented, especially on the Joint Nominating Committee for the Election of the Presiding Bishop.

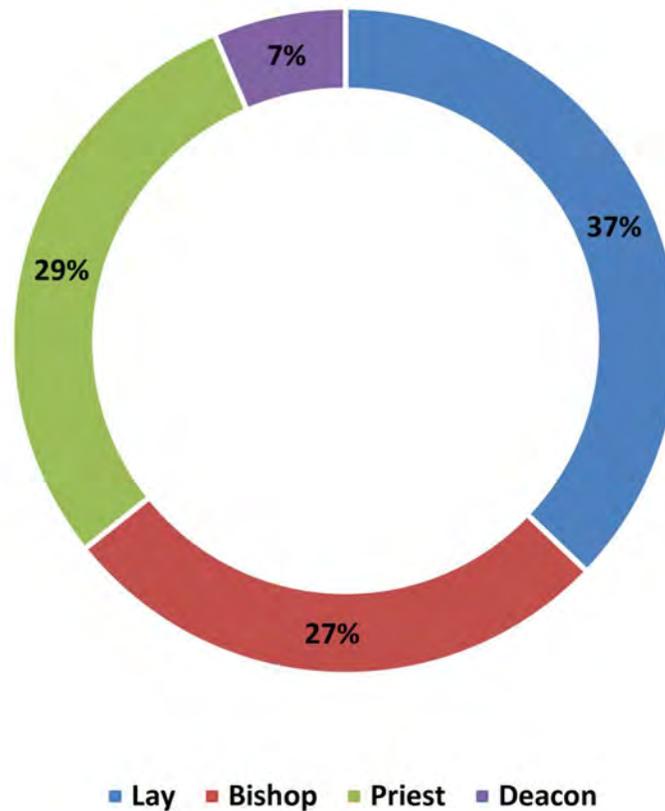
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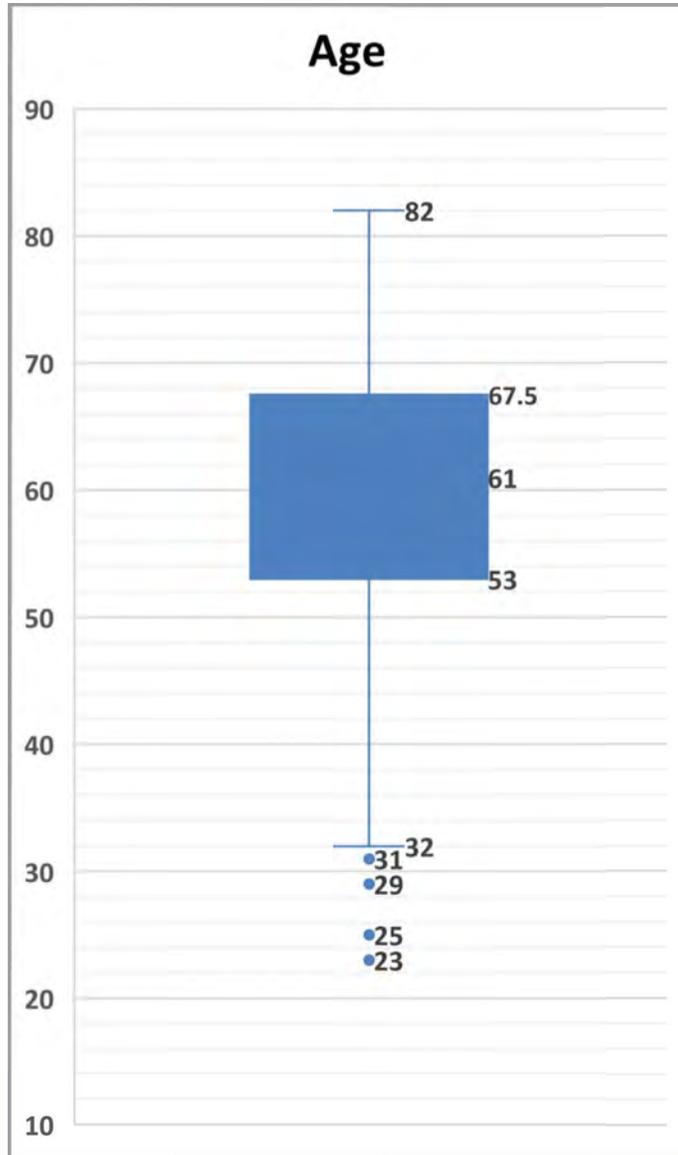
The following statistics regarding the diversity of our nominees were prepared during and immediately following our October, 2020 virtual meeting.

This year, the slate includes a total of 139 nominees. This is a greater number than in 2018, when the total slate was 80, largely because of the addition of two more bodies for the committee to seek nominees for: the Court of Review, and the Joint Nominating Committee for the Election of the Presiding Bishop.

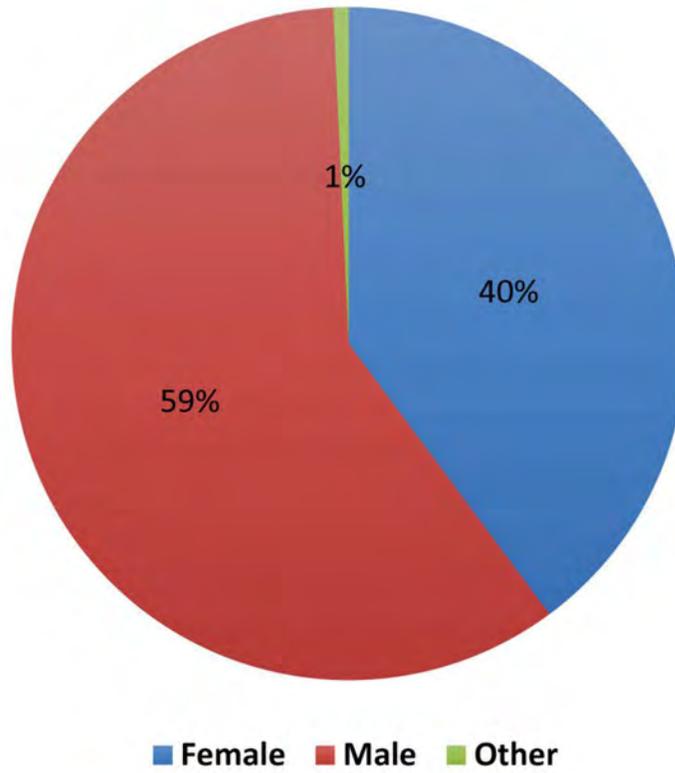
The 139 individuals on the slate represent all four orders of ministry: 52 laity, 38 bishops, 40 priests, and 9 deacons. Geographically, they represent five countries, 38 states and 68 dioceses. They ranged in age from 22 to 81 at the time of their applications, with the median age being approximately 59. The group is 59% male, 40% female, and 1% other. 73% of the nominees in this slate identify as White or Anglo, 15% as Black or African American, 4% as Asian, 4% as Hispanic/Latino/a, and 4% as Other. Approximately 88% have received anti-racism training.

Orders of Ministry

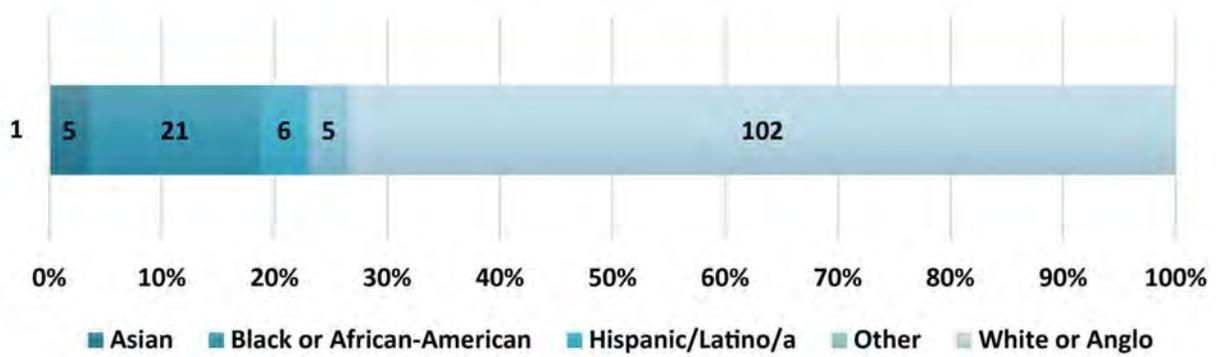




Gender



Ethnicity



Proposed resolutions

A105 Amend Joint rule VII.18 regarding the makeup of the Joint Standing Committee on Nominations

Resolved, the House of _____ concurring, that the 80th General Convention amend Joint Rules of Order VII.18 amended as follows:

18. The Joint Standing Committee on Nominations shall be composed of three Bishops, ~~three~~ two Presbyters, *one Deacon*, and six Lay Persons. Members who are Presbyters, *Deacons* or Lay Persons shall have served as deputies to the most recent General Convention and will continue to serve as members of the Joint Standing Committee until the next General Convention.

EXPLANATION

The Joint Standing Committee on Nominations suggests that the Joint Rules of Order be amended so that clergy serving on the committee can include all three orders of bishops, priests, and deacons.

A106 Amend Joint Rules of Order VII.20 to reduce the number of nominees required to be presented by the Joint Standing Committee on Nominations

Resolved, the House of _____ concurring, that the 80th General Convention amend Joint Rules of Order VII.20 as follows:

20. Except for the Secretary of the General Convention and the Treasurer of the General Convention, the said Committee is instructed to nominate a number, equal to at least ~~twice one and a half~~ *one and a half* times the number of vacancies, which shall be broadly representative of the constituency of this Church; to prepare biographical sketches of all nominees; and to include such nominations and sketches in the *Blue Book*, or otherwise to circulate them among Bishops and Deputies well in advance of the meeting of the next succeeding General Convention; this procedure, however, not to preclude further nominations from the floor in the appropriate House of the General Convention.

EXPLANATION

It is the experience of the current joint standing committee that coming up with approximately 162 nominees to fill 81 positions is difficult. Reducing the number of required nominees to one and a half times the open positions still presents a choice to the Convention.

The current rules in place do not allow for sufficient meaningful discernment among the candidates.

EXECUTIVE OFFICE OF THE GENERAL CONVENTION

SECRETARY OF THE HOUSE OF DEPUTIES

This is a three (3) year term. The House of Deputies elects the Secretary of the House of Deputies; by concurrence of the House of Bishops, the Secretary of the House of Deputies also becomes the Secretary of the General Convention.

Michael Barlowe

Priest
New York, NY
Grace Cathedral, San Francisco
California, VIII



It has been a pleasure to serve as Secretary since 2013. Working with hundreds of amazing volunteers from around the church, other officers, and the extraordinary staff of the General Convention Office, we have transformed the work, administration, and technologies of church governance. The Episcopal Church places high value on involving members in participatory decision-making, and my goal has been to serve by helping the church organize toward such engagement, discernment, and mission. I came to the Episcopal Church as a young adult, and discovered a faith community transforming the world while leading people toward God. Ever since, I have been passionate about our church, working to strengthen its life and ministry in the world. I believe our Church has a mission that deserves our highest aspirations, greatest creativity, and boldest proclamation of the Good News. Now, as I move toward "passing the torch" to new generations, serving in this office would be a great honor.

TREASURER OF THE GENERAL CONVENTION

This is a three (3) year term. The House of Deputies elects this position; the House of Bishops confirms this election.

Kurt Barnes

Lay
New York, NY
Grace Church (Millbrook)
New York, Il



Since 2003 I have served as Treasurer & CFO of The Episcopal Church and Treasurer of the General Convention, continuing a career in finance and investment in for-profit and not-for-profit organizations. I worked for the RAND Corporation as economist; Time Inc. in corporate planning and as editor of Fortune Magazine; Inco Ltd. as finance officer; and with Morgan Stanley Asset Mgmt. I was appointed by the NYS AG to correct financial mismanagement at Hale House; and assisted Amnesty International to restructure its financial management. I have passion for thoroughness, working efficiently and avoiding politics in carrying out God's mission. For me that means avoiding duplicative activities and recognizing the fiduciary responsibility to work collaboratively for the entire church, not favoring individual groups. Extensive historical knowledge and the ability to explain complicated subjects patiently and simply are gifts that continue to serve me in assisting the church in multiple roles.

THE CHURCH PENSION FUND TRUSTEES

TERM OF OFFICE:

6 years

NUMBER OF TRUSTEES TO BE ELECTED:

12

BACKGROUND ON THE CHURCH PENSION FUND

The Church Pension Fund (CPF) is a financial services organization that serves the Episcopal Church. CPF and its affiliated companies, collectively referred to as the Church Pension Group (CPG), maintain three lines of business—employee benefits, property and casualty insurance, and publishing. They provide retirement, health, life insurance, and related benefits for clergy and lay employees of the Episcopal Church, as well as property and casualty insurance, and book and music publishing, including the official worship materials of the Church

POSITION DESCRIPTION FOR TRUSTEES

Trustees are elected by General Convention to serve on the Board of Trustees of CPF (CPF Board) for 6-year terms. The CPF Board is comprised of 25 trustees, of which 24 are elected by General Convention and one is CPF's Chief Executive Officer. In addition, each trustee typically serves on two of the six committees of the CPF Board.

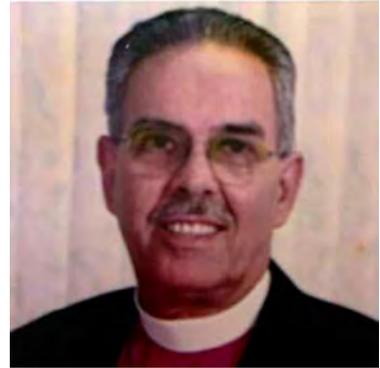
Legally, the CPF Board is the board of directors of CPF, a New York not-for-profit corporation, and as such plays a critical role in governance and oversight of the work of the companies that comprise CPG. Among other things, the CPF Board makes policy decisions that affect CPF's investment strategy and policy, and the pensions and other benefits and services that CPG offers.

COMPETENCIES & QUALITIES

The CPF Board needs trustees who have expertise and experience in areas of business similar to CPG's principal businesses (e.g., investments, pensions, employee benefits, insurance, healthcare, and publishing) and relevant skills (accountants, attorneys and other business and financial professionals), as well as familiarity and experience with the Church. In addition, the CPF Board values diversity (broadly defined) among its trustees. Trustees must also have computer literacy and internet access.

David Alvarez

Bishop
Carolina, Puerto Rico
Saint Stephen's
Puerto Rico, IX



Served as deacon and priest from 1965 and as first bishop elected by the diocese in 1987 until retirement in 2013.

Developed the health and social ministries through the subsidiary corporations of Episcopal Health Services, Episcopal Social Services and Episcopal Homes for the Elderly. Worked with accountants, investors, health care administrators, human resources and boards of directors of the diocese and the subsidiary corporations as well as with government agencies in social programs.

Developed the financial self-support of the diocese, contribution to the Budget of General Convention, creation of a diocesan Trust Fund and the Church Pension Fund for the clergy and lay employees.

Michael Barlowe

Priest
New York, NY
Grace Cathedral, San Francisco
California, VIII



My relationship with the Church Pension Fund (CPF) goes back 40 years, first as a clergyperson and clergy spouse and then as a diocesan executive who advised lay and clergy leaders about assessments, pensions, and medical and property insurance. As an officer of The Episcopal Church, I have conferred regularly with CPF senior management and trustees in such churchwide concerns as lay/clergy pension parity, church data analysis, and pensions for Cuba. I was the convener of the recent task force studying the relationship between CPF and the church.

We have been blessed by General Convention's foresight in creating CPF; I believe the next century can be equally blessed, even as the church and its patterns of ministry evolve. As we move into that future, my record and commitment to fairness and equity, my experience in overseeing complex systems, my background in finance and investments, and my knowledge of CPF at all its levels might benefit the work entrusted to its leaders.

Brendan Barnicle

Priest

Portland, OR

St. Francis of Assisi, Wilsonville, OR

Oregon, VIII



Prior to my ordination, I spent over 20 years working in the investment world in a various capacities. For most of that time, I worked as a research analyst where I reviewed company performances and made investment recommendations to institutional investors. In addition, I served as a corporate finance lawyer and as the chief financial officer of an Internet start-up. So, I was blessed to view the investment work from a variety of angles. During my discernment, I questioned what God would do with my investment experience, and my priest mentor assured me that "God would use it all," and indeed, God has used it all. Since ordination, I have served in a variety of investment capacities. I serve on the Diocese of Oregon Board of Trustees and on the Diocesan Investment Council. I am currently serving as the Chair of the General Convention Task Force on New Funding for Clergy Formation. I am also the past Chair of the Trinity Cathedral Endowment and a past trustee at CDSP.

Gawain de Leeuw

Priest

White Plains, New York

St. Bartholomew's Episcopal Church

New York, II



For thirty years, I studied the impact of governance in economic firms, especially effective coordination in volunteer organizations. I worked at one of the country's major Community Reinvestment Banks to adapt financial products to underserved neighborhoods. I have been involved in the intersection of socially responsible investment and environmental stewardship, and worked with investment teams in modest sized institutions.

In 2019 I published *The Body of Christ in a Market Economy*, a biblical and theological study about the impact of governance in economic institutions, especially churches. I seek to offer some foundations for understanding the choices the church makes as an ordered institution in market networks. I show that emotional competence is an important skill that has an impact in firms, and that the church has a role in sharpening it through formation. I now serve as a Trustee in the Diocese of NY.

Ian Douglas, Ph.D

Bishop
Essex, CT
Connecticut, I



Since 2010, I have served as bishop diocesan of the Episcopal Church in Connecticut, the oldest and one of the largest and most diverse dioceses in The Episcopal Church. As bishop I have helped our parishes and diocesan organizations adapt to the realities of the post-Christendom world. We have reimagined our life together focusing on God's mission of restoration and reconciliation in our neighborhoods and beyond. As chair of our diocesan investment fund with 125+ participating organizations and combined assets of over \$140 million, I led the trustees to pursue a socially just and environmentally sustainable fund. I am an author, teacher, activist and organizer across The Episcopal Church and Anglican Communion. I work for unity in God's mission by following Jesus. In the wake of the COVID pandemic, the church needs experienced, forward-looking, creative leaders who are not afraid to do new things. I will bring this experience and vision to the Trustees of the Church Pension Fund.

Mark Furlow

Priest
Lynchburg, VA
n/a
Southwestern Virginia, III



I am a priest with both pastoral and administrative gifts centered on mission, strategy, and organizational learning. I also have a good sense of spatial reasoning and like creative challenges that require both adaptive and technical thinking. For the past 4 years, I have applied my experience as a pastor and my skills as administrator to my work as a Canon to the Ordinary and diocesan administrator. If elected, I hope to apply all these gifts and skills to the ever-evolving work of the Church Pension Group in its efforts to support the Mission of The Episcopal Church. As a recent member of the CPG Client Council, I have an acute awareness of some of the challenges facing CPG and would like to assist in propelling the work of CPG for future generations of the Church.

P. Ronald Harrington

Lay
Arcadia, CA
St. Edmund's San Marino
Los Angeles, VIII



A lifelong Episcopalian, I have been involved in financial management throughout my career. When practicing as a CPA, I was designated as a national expert in financial instruments, investment companies, and security broker-dealers. I was a security principal and licensed investment advisor at two investment advisory firms responsible for several billion dollars of assets under management. This work was focused on institutional investors, including the endowments and pension funds of universities, public sector organizations and non-profit foundations.

My experience with clergy and others has impressed me with the significance that the design and the security of the Church pension arrangements have on their lives. I have a particular interest in ensuring that the provisions of our benefit arrangements are responsive to the needs of non-traditional families; also, that the programs be adapted as possible to support the future diversity and changing demographics of Episcopal clergy.

Alison Harrity

Priest
Maitland, FL
St. Richard's Episcopal Church
Central Florida, IV



At age 27, newly ordained and pregnant with my first child, I attended my first Planning for Tomorrow Conference. When Kevin Caruso walked me through the applications for life insurance and RSVP, I had a first hand experience of the depth of care that the church had for me and my family. Kevin taught me to pay close attention to the benefits I was currently receiving and to stay up to date with changes over both the short and long term. Attention to detail is one of the gifts I can bring to this position. As associate at a large church and now rector of a mid sized church, my experience as a participant in CPG gives me the gift of 20 years of perspective on the benefits of participating in the various products that CPG provides. As a priest looking forward to 20 more years of ordained ministry I bring the gift of considering what the future holds for CPG and what more good it can do in the world for more and more people.

Amy Haynie

Priest

Highland Village, TX

Trinity Episcopal Church, Fort Worth

The Episcopal Church in North Texas, VII



I earned a bachelor of science in nursing and I am a registered nurse and priest. My spouse is a disabled practicing physician. I know healthcare and health insurance issues from many different sides. Over the span of my adult years, I have held private insurance policies, health savings account policies, and group policies. I know the safety net that adequate insurance policies can provide, and the peril that inadequate insurance policies can inflict. I am a hard working committee member that meets deadlines. I am trained in alternative dispute resolution, which can come in handy in committee work. It matters to me that the end result of the work produced shows integrity, transparency, and intentional stewardship. I am not as well-versed in financial business language, but it is not completely unfamiliar to me. I would work hard to prepare for meetings beforehand. It would be an honor and a blessing to serve the larger church through the Church Pension Fund.

Robert Kinsey

Lay

Great Falls, VA

St. Albans Episcopal Church (DC)

Washington, III



I recently retired after some 38 years as an institutional investment advisor and am looking for ways to contribute my lifetime skills to the Church as a lay person. For 17 years I managed fixed income bond portfolios at a variety of nationally recognized firms and covered investment grade, high yield, senior bank loan, absolute return, and emerging market debt strategies. Following my tenure as a portfolio manager, I represented several firms' investment and ESG activities to many of the largest international and domestic pension funds. Details may be found in my attached resume. Currently, I am a member of the Board of Governors of St. Albans School in Washington, DC, serving on the Finance and Diversity committees and represent the school on the National Cathedral's Committee on Child Safety. I am a past board member of the Episcopal Church Foundation. Prior to moving to Virginia in October of 2019, I was a congregant, LEM, and verger at St. Bart's in New York City for nine years.

Cynthia Kittredge

Priest
Austin, TX
Church of the Good Shepherd
Texas, VII



As Dean and President of Seminary of the Southwest I have gained skills of discernment, prudence, and sound judgment in financial matters. Fundraising, communications, and focus on mission have been central in my leadership. In my work with boards I bring experience of navigating the boundary between oversight and management and of developing investment strategy that takes into account social responsibility. With its history and its resources, the Episcopal Church and the Church Pension Fund play critical roles in articulating and envisioning how a Christian institution participates in the economy in a way that is inclusive, equitable, and just. I bring experience as a teacher and writer and an interest in the publishing mission of CPG. Spiritual, financial, and relational wellness is a long-standing commitment. In collaborative decision making with peers, I look forward to guiding the strategy of the Church Pension Fund, as it adapts and renews its vision in response to the changing landscape of the Episcopal Church and the needs of its leaders.

Kevin Lindahl

Lay
Denver, CO
St. Barnabas Denver
Colorado, VI



I have been an executive and an attorney responsible for providing pension and disability benefits for Colorado's fire fighters and police officers for over two decades, managing over \$5 billion in assets for over 20,000 public safety officers. I have a deep understanding of fiduciary obligations, investments, finance, actuarial science, federal regulation and business processes as they relate to the administration of pension benefits. I am a recognized industry leader and frequent speaker at national training conferences for attorneys and public pension board members on topics including fiduciary duty, pension law and regulation, plan design, and corporate governance reform. I currently serve as a CPF Trustee, Investment Committee Vice-Chair, and Benefits Policy Committee member. I have served the Diocese of Colorado as a Board Member and Investment Committee Chair of the Colorado Episcopal Foundation. I respectfully ask for your support for a second term.

John McCray-Goldsmith

Lay
Berkeley, CA
Trinity Cathedral San Jose /
Congregación de Nuestra Señora de Guadalupe
El Camino Real, VIII



I'm a preacher's kid and clergy spouse with missionary roots in Latin America, where I lived for seven years and led a 500-house Habitat for Humanity hurricane reconstruction project in Bluefields in the Anglican Diocese of Nicaragua. From there I earned an MBA and worked for 20 years raising billions of dollars in the municipal bond market to fund climate-related public infrastructure projects including start-up renewable energy utilities, mass transit and high-speed rail programs, and clean water utilities. In my current role as a Managing Director on the team managing the largest bank-owned municipal bond portfolio in the world, my responsibilities include careful analysis of pension fund policies of several hundred municipalities across the US where we've invested capital. My deep hope is to bring these experiences and capabilities to address the challenges the Church Pension Fund faces as it manages its assets and businesses to meet the needs of the church.

Sandra McPhee

Lay
Evanston, IL
St. Matthew's Evanston, Illinois
Chicago, V



I was honored to be elected a Trustee of the CPG board in 2015. I am the Vice-Chair of the Benefits Policy Committee. As an attorney with 45 years of estate planning experience, and a life-long Episcopalian, I believe our church must provide for all of its retired lay and clerical employees. I have been a trustee of my parish's endowment and have served on boards of a variety of non-profits. I have a broad view of the church, having served on the Executive Council, the Standing Commission on World Mission, the Steering Committee of the Episcopal Partnership for Global Mission, the Board of the Consortium of Endowed Parishes, and the Board of Bexley Seabury Seminary, and as President of the Standing Committee of the Diocese of Chicago. I am committed to the reconciling work of the church, particularly with our many international partners. My skills include the ability to synthesize information, to ask tough questions, and to encourage compromise. If re-elected, I would bring all of my skills, experience and passion to the CPG Board.

Richard O'Brien

Priest

Las Vegas, NV

Epiphany Episcopal Church

Nevada, VIII



I am a firm believer in what Paul calls the "gifts of the spirit." We are all given gifts from God with which we are called to ministry in the world. The challenge for us is to discern these gifts, then find ways to apply them in service to others. As a person called to ordained ministry later in life, I had a long career in the insurance industry which provided me with a set of skills in that area. These skills, combined with my experience in parish and diocesan life, could benefit the CPG and give me an outlet to utilize these gifts of the spirit.

Daniel Packard

Lay

Phoenix, AZ

All Saints' Phoenix

Arizona, VIII



I would be honored to serve the church as Trustee of the CPF. I have accounting and law degrees, and an MBA. I was CPA with Ernst & Young, and then I was an internal auditor for a health insurance company preparing their IPO. After grad school, I was an attorney in a law firm. I now have my own firm which serves public charities, private foundations, and donors. This is my 2nd General Convention. My other church experience includes 9 years on Arizona Diocesan Council, 9 years on diocesan finance committee, 2 years as Executive Director of Chapel Rock Conference Center, Vestry and Warden at All Saints Church & Day School in Phoenix, and the pension committee at my prior General Convention. Each of these had substantial interaction with CPF. I am also co-founder of ONE Community Foundation, which focuses on inclusion and diversity regarding LGBTIA+ issues with corporations and local government. If elected as a Trustee, I will always be guided by our shared faith and baptismal covenant.

Guy Patterson

Lay
Harrisburg, PA
St. Stephen's Episcopal Cathedral
Central Pennsylvania, III



I have over thirty years of insurance experience including leading roles at insurance companies, broker/administrators and as chief administrative officer of a state association's various insurance programs. In these various capacities I have overseen a wide variety of programs from health and welfare benefits to offshore captive arrangements. I currently work with nationally recognized clients and their respective insurers. I am located in Harrisburg, PA and I am the former Senior Warden of St. Stephen's Episcopal Cathedral. In addition, I have served on the Diocese of Central Pennsylvania's committee to implement the Denominational Health Plan. I am an active member of International Foundation of Employee Benefit Plans and I hold the CEBS designation.

Brian Prior

Bishop
Minneapolis, MN
Minnesota, VI



I am a lifelong Episcopalian blessed to have served as layperson, deacon, priest, bishop, and current vice chair of the CPG Board. Committed to relational and inclusive ministry, my personnel and fiduciary practices are framed in the Gospel mandate of justice and mercy. My responsibilities have included congregations, schools, senior housing, camps/retreat centers, diocesan investments, and pension plans. I have worked on the Denominational Health Plan, Lay Employee Pension System, Clergy Pension Plan revisions, Non Domestic Dioceses, Compensation, Diversity and Work Place Values to create/redevelop fair, just, equitable personnel policies and benefits. I am dedicated to helping faith communities in becoming Beloved Community by clarifying their identities through gift discernment, engaging local context, and creating sustainability through missional partnerships. With my passion and experience in ministry, business and benefits, I hope you will see me as a strong candidate for re-election.

Gregory Rickel

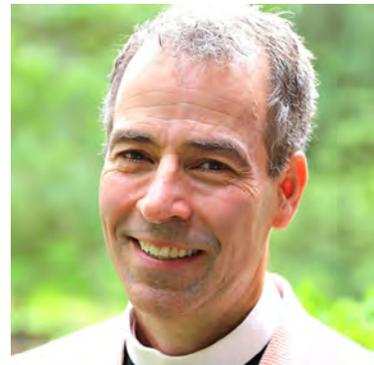
Bishop
Seattle, WA
Olympia, VIII



I have a good experience both in education (Masters in Health Services Administration) and work experience (hospital administration) as well as Board experience in many and varied organizations. I also hold a Master's in Interpersonal and Organizational Communications which is a skill that helps in both communal and individual communication and joint work. My experience as a priest (23 years) and bishop (13 years) in the Episcopal Church informs much of the work of CPG on a daily basis. Also, after serving in my first 6 year term, I believe I am even more effective as a Board member for, and on behalf, of this Church we share.

Sven vanBaars

Priest
White Marsh, VA
Abingdon Episcopal Church
Virginia, III



While not a financial professional, I hold a Master's degree in public finance and am adept at understanding financial and governance issues. As a presbyter of our church I also see first hand the issues that employees and parishes have in ensuring financial stability in retirement. I would hope to use my understanding of finance and of the mission of the church to provide direction to the Pension Fund.

Anne Vickers

Lay
Parrish, Florida
St. Thomas Episcopal Church, St. Petersburg, FL
Southwest Florida, IV



As Canon for Finance and Administration of the Diocese of Southwest Florida, I'm thrilled to combined my expertise in finance, technology and communication with my lifelong calling to serve the Episcopal Church. In my first term as Trustee of the Church Pension Fund serving on the Investment Committee, my CFA credentials and inquisitive spirit enable me to understand, inquire and assess the technical aspects of a \$13B portfolio. My lifelong profession as a CFO informs my ability to execute the important fiduciary oversight of a trustee. And my diocesan experience as a trusted advisor to congregations, schools and supporting Episcopal organizations fuels my passion for the benefits of detailed analysis, effectively communicated with a clear and celebrated alignment of goals. I see and find indicators of success and opportunity every day, and will enthusiastically drive innovative ways to extend best practices, thereby continuing to safeguard a bright and bold future for our Church.

Sandy Wilson

Priest
Baltimore, Maryland
St. Bartholomew's, Baltimore
Maryland, III



I believe strongly in the servant ministry of the Church Pension Fund, as Trustees work diligently to educate ourselves to work with the staff to insure that the Fund will be around to insure a future for all employees of the Church. In the last six years and I have served on the Audit, Investment, Finance and Benefits Policy Committees, after a season as COO at St. Aug's University, responsible for pension and other benefits and the \$29 million budget. With the perspective of a newly retired priest with an active coaching ministry with clergy and laity, I bring the perspective of those most affected by the fund. Understanding my fiduciary responsibility to the fund, which is also a moral responsibility to its clients/stakeholders, makes me an ideal candidate to lend my voice to and actively contribute to decision making that balances justice and the common good. It would be my prayerful honor to be elected to serve again.

MEMBERS OF THE COURT OF REVIEW

TERM OF OFFICE:

3 years

Persons appointed to the Court of Review shall continue to serve until their respective successors have been elected, except in case of death, resignation or declination to serve. Members of the Court of Review who are currently appointed to a panel shall continue to serve on that panel until its work is completed.

NUMBER TO BE ELECTED:

Three (3) bishops and one (1) alternate elected by the House of Bishops.

Six (6) clergy with no fewer than two (2) priests and two (2) deacons and six (6) lay persons, and one (1) clergy alternate and one (1) lay alternate elected by the House of Deputies.

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE:

Bishops: One from Province I, II or III, one from Province IV, V or VI, and one from Province VII, VIII or IX.

Clergy and Lay: One-third from Province I, II or III, one-third from Province IV, V or VI, and one-third from Province VII, VIII or IX. No more than two (2) clergy canonically resident in the same diocese, and each lay person shall reside in a different diocese than any other lay person. Priests, Deacons and lay persons shall be or have been members of the Disciplinary Boards of their respective dioceses.

Members of the Court of Review should be well-versed in the Canons; understand the goals and processes of Title IV; embrace a process that includes reconciliation as well as justice; and be able to articulate that goal in a way that does not deny or diminish the hurt of those who are feeling wronged. Compassion, dedication to finding solutions/resolutions that uphold the Canons in a manner that serves the overarching goal of reconciliation, and clarity about acceptable/unacceptable behavior are all essential qualities for Board members. Analytical thinking and the ability to balance the letter and spirit of the law are equally essential. It is vital that incumbents have computer literacy and Internet access. Candidates need the ability to keep information confidential and understand that it can be shared only within the guidelines of the Title IV process.

Stephen Alpern

Lay
Columbia, MD
Christ Church, Queen Caroline Parish, Columbia, Maryland
Maryland, III



I have served as President of the Disciplinary Board of the Diocese of Maryland and as Presiding Judge of the Board's Ecclesiastical Court predecessor since 2008. By training, I am an attorney and I graduated from Columbia University School of Law in 1971 and was admitted to the District of Columbia Bar. I had a twenty-nine-year career in the federal government most of which was served in executive level legal positions, both as an advocate and as a neutral. Since my retirement in 2000, I have worked as a self-employed labor arbitrator, hearing cases throughout the United States. I am on the arbitration rosters of the American Arbitration Association, the Federal Mediation and Conciliation Service, the National Mediation Board, as well as several states. I believe my broad experience in litigation on both the trial and appellate levels, well suits me to this position. My joint selection by parties to labor disputes reflects upon my reputation for fairness.

Shelly Banner

Priest
Oswego, NY
St. James, Pulaski, NY
Central New York, II



I have served as an elected member of the Diocese of Central New York's Disciplinary Board for 6 years, serving two different bishops. At present, I am the president of this committee. As a member, I have actively served on reference panels, a conference panel, and I was selected to serve on a hearing panel. Each of the outcomes have, of course, ended differently; some ended with the decision of the reference panel, some have ended with an accord, either prior to the conference panel convening, or an accord reached after the convening of a hearing panel. The structure of Canon IV is such that the over-arching principals of compassion, mercy and fairness are upheld within each procedure. The measured steps of the process create space for understanding, reflection, and consideration. I find great beauty within the structure.

John Bauerschmidt

Bishop
Nashville, TN
Tennessee, IV



I served on the Court of Review from 2019 to the present. I have experience with clergy disciplinary matters from 2007 to the present. I have broad experience of the church as an ordained person from 1984 until the present, and as a bishop from 2007 to the present. I believe that the good order of the church requires accountability to each other.

Julian Bivins Jr.

Lay
Charlottesville, Virginia
Move across three parishes because my spouse is
on the Committee on Congregational Missions
Virginia, III



For over 15 years, I sat on the various Diocese of Virginia ecclesiastical courts and was intimately involved in all aspects of the process and related diocesan policies and procedures. I was also the chair for numerous years.

Karen Clopton

Lay
San Francisco, CA
St. James
California, VIII



As an African American woman, mother, civil rights activist, lawyer, judge, public servant, global citizen, and Episcopalian, who I am informs how I view the world and my role in it. My goal in life is to think critically, analytically, and intelligently. Currently, I am serving on the inaugural Court of Review, I am also President of the Interdiocesan Joint Disciplinary Board, and I served as the Presiding Judge of the Ecclesiastical Court for the Diocese of California for ten years. I am currently a Human Rights Commissioner for the City and County of San Francisco and served as the Chief Administrative Law Judge of the California Public Utilities Commission for 9 years. My experience has prepared me well to continue with the Court with integrity, discernment, and compassion.

L. Zoe Cole

Lay
Denver, CO
St. Andrew's
Colorado, VI



As a lawyer, I believe the purpose of the law is to contribute to human flourishing, that it is given to us to support healthy relationships necessary to our lifelong formation in the image and likeness of Christ. I have worked to reveal this reality in a variety of roles as an attorney and judicial officer, as well as in my work in the church, invoking the law in its fullest human context and purpose. As Rev. Dr. Pamela Cooper-White says, the canons are “a God given expression of care for the ordering of the church that is grounded not merely in restraint of evil... , but focused on creating a community in which every member is supported in living a life grounded in desire for God and the joy of being in harmony with the original goodness of God’s creation.” This experience and set of values makes me the ideal candidate to serve the church as a member of the Court of Review to receive and determine appeals from diocesan hearing panels and decide venue issues according to Title IV.

Rodney Davis

Priest

Carmichael, CA

Saint Michael's Episcopal Church, Carmichael, CA

Northern California, VIII



I have served as the president of the Joint Disciplinary Board of the Dioceses of California, Northern California, El Camino Real, and San Joaquin. In that role I acquired knowledge of the standards and goals of Title IV and have applied them in disciplinary proceeding that were before me. Because of the broad jurisdiction of the Joint Board, consisting of four distinct dioceses, I have participated in the application of Title IV in a number of varied settings and cultures. Over the course of my life, I have acquired the perspective and experiences of a judge, lay leader, and priest. That has been valuable in applying Title IV in a manner that strives for reconciliation as well as justice, and treats both those accused of misconduct and their accusers with dignity, respect, and compassion. My interest in and involvement with professional ethics is longstanding and has led to service on judicial disciplinary panels.

Delbert Glover

Lay

Washington, D.C.

Washington National Cathedral

Washington, III



I am a candidate to serve as a Lay Member for the Court of Review. Although not an attorney, I have completed the Harvard Law School courses on Mediation and Negotiation. I have served as a Mediator for the Hampshire County Massachusetts Small Claim Court and on Grand Jury duty in Rhode Island, and as an Advisor in Title IV deliberations. A retired business executive, I offer my corporate experiences to the Church, drawing on strong leadership, professional and interpersonal skills. I have served the Church as Executive Assistant to the Rector of Trinity Church, Wall Street; Associate Dean of General Theological Seminary; Chief Administrative Officer at the Riverside Church. I have been a lay deputy and or alternate to several General Conventions on Executive Council and the Church Pension Fund board.

Susan Haynes

Bishop
Newport News, Virginia
Southern Virginia, III



As a former mental health professional, I have a thorough understanding of the dynamics of human behavior and competency in interpersonal relationships. I am comfortable one-on-one or in groups. I am able to weigh the facts, feelings and merits of an issue from several different angles. I believe that all occasions of interpersonal conflict and disruption are an invitation from the Holy Spirit to work for reconciliation and to be better formed for God's Kingdom. As a person of deep prayer, I rely on that Spirit to guide and direct deliberations and listenings. As a non-anxious presence, I am grounded in the patience to listen and be deliberate and intentional in taking action, drawing firm boundaries, and expressing compassion. My experience in Diocesan leadership as both a Presbyterian and a bishop has given me a solid introduction and grounding in Title IV procedures.

d'Rue Hazel

Deacon
Columbia, SC
Diocesan Staff
Upper South Carolina, IV



As a Deacon, diocesan staff member and Title IV Officer, I have fully engaged the work of reconciliation which lies at the heart of restoring all people in unity of God and each other in Christ. It is the focus of our Disciplinary Canons. The act of, or the willingness to be restored, is therefore central to this difficult and sensitive work. Having served as a Diocesan Title IV Officer and Reference Panel member for the last eight years, I have constantly pursued personal growth and development for competently participating in this restorative work of the Church. This has included disciplined work toward practiced proficiency in and knowledge of the Title IV Canons, Bowen Family Systems, Mediation Skills, Conflict Resolution, and Facilitator Training, bringing them effectively and compassionately to bear when receiving complaints. I have made it a particular priority to give proactive attention to my own emotional, spiritual, and physical health, enabling me to take part in this ministry as a healthy self-differentiated leader.

Sharon Henes

Lay
Cottage Grove, WI
St. Dunstan's Episcopal Church, Madison
Milwaukee, V



I currently serve on the Court of Review and the Diocese of Milwaukee's Title IV Disciplinary Board. I have knowledge of the Title IV and the Court of Review process. I'm well-versed in the Canons. For over 25 years I have worked with professional licensing boards, including medical, pharmacy, nursing, and psychology. My experience includes the prosecution of disciplinary cases, the writing of administrative laws, including unprofessional conduct laws. In addition, I have two years of experience overseeing the impaired professional program and monitoring the compliance with disciplinary orders to achieve rehabilitation of professions and safely return them to practice. My understanding of discipline across a variety of professions brings a unique perspective to the Court of Review.

Lisa Hines

Priest
Austin, TX
The Episcopal Diocese of Texas (Canon for Wellness and Care/
Safeguarding Minister/Intake Officer)
Texas, VII



I am a skilled listener and clear communicator and very familiar with the intricacies of Title IV after spending years as the President of the Disciplinary Board for the Diocese of Texas and now as the diocesan Canon for Wellness and Care whose responsibilities include serving as a Title IV Intake Officer, teaching Title IV to new clergy and clergy-to-be, and helping to train canonical advisors and new members of the Disciplinary Board. My legal background facilitates my ability to interpret and apply the canons, and my years as a parish priest taught me the pressure and temptations of ministry and the dynamics and ambiguities that can lead to Title IV complaints. I am equally committed to holding members of the clergy accountable for their behavior and to treating all parties in Title IV proceedings with respect and compassion, recognizing our common need for grace and forgiveness.

A. Robert Hirschfeld

Bishop
Concord, NH
New Hampshire, I



Having walked through the Title IV process as a bishop with a number of clergy, I deeply resonate with the need to work towards reconciliation, justice, and amendment of life in a way that does not deny or diminish the hurt of those who are feeling wronged. Title IV continues to be an evolving process, and I am eager to be a part of its ongoing refinement in order for us more ably to fulfill the canon's goals of accountability, justice, reconciliation, and growth in holiness.

Toni Hogg

Lay
Hayes, VA
Abingdon, White Marsh, Gloucester, VA &
St. Aidan's, Virginia Beach, VA
Southern Virginia, III



I have been privileged to serve on numerous committees and boards in the wider church. I have been a lay deputy to General Convention since 2006. I have served on the Presiding Bishop's Confirmation Committee (Bishop Curry was elected), Ministry Committee and presently serve on the Joint Standing Committee on Nominations.

I believe that my experience, acquired insight and skills are well-suited to the continuing challenges of General Convention and the committee work. I have been blessed to witness and learn from so many others in the church, and this has left me well-versed in discernment, listening and dialogue skills which impart to me an inclusive perspective of The Episcopal Church.

James Hunt

Lay
Helena, MT
St. Peter's Episcopal Cathedral
Montana, VI



I have been a trial lawyer since 1984. I have appeared before the Montana Supreme Court over 30 times, the Ninth Circuit Court of Appeals several times, and the U.S. Supreme Court one time. I have practiced in state and federal trial courts. I served on my parish Vestry as Junior and Senior Warden. I served on the Standing Committee, Diocesan Council, and as Diocesan Chancellor. I helped resolve the Bishop Charles I. Jones matter in Montana. Bishop Charles Keyser appointed me an attorney advisor to the ECUSA Title IV committee that investigated Bishops before Title IV was rewritten. At an early age, my father, a former justice on the Montana Supreme Court, taught me courts exist to resolve disputes fairly and quickly. I strive to be compassionate and forgiving, yet discerning. Experience, good judgment, and the ability to listen are critical when trying to understand and resolve issues. I believe I have developed these qualities.

Gregory Jacobs

Priest
Durham, North Carolina
St. Titus Episcopal Church
North Carolina, IV



I have served the Church for 20 years in matters involving Title IV clergy misconduct. As a member of the Constitution & Canons Committee, I helped refine and clarify canonical language adopted in the initial Title IV provisions, working closely with diocesan chancellors. For 15 years, I served as the principal Title IV Intake Officer in both the Dioceses of Massachusetts and Newark. My responsibilities included initial intake, interview of all parties/witnesses, and investigation of more than a dozen Title IV allegations brought against clergy. My work culminated in reports to disciplinary review panels in which I summarized the results of investigations and recommended appropriate responses. I participated in later stages of Title IV cases, including conciliation/resolution efforts with clergy and injured parties. I was also responsible for communicating and implementing Title IV's provisions in these dioceses. In 2019, I co-led a Title IV workshop for newly-elected bishops.

Elisa Kirby

Deacon
New Bern, NC
Christ Church New Bern, NC
East Carolina, IV



In my volunteer service with the Coast Guard Auxiliary I was responsible for the conduct of those in my area of the state, to see that they were abiding by the regulations of the US Coast Guard, which involved counseling and recommending any disciplinary action to the Fifth Southern District of the Coast Guard. I have served on my diocese's disciplinary board and have taken the three day Title IV training conducted by the Chancellors to the House of Deputies. People come to me with spiritual concerns and alcoholism/drug issues--both their own and that of family members. I can draw on my many years of recovery to help those who are addicted. I understand the sorts of behaviors that addiction causes, many end up related to Title IV matters. Having been in a position to interview and hire clergy and church staff I feel I am perceptive and able to listen and evaluate fairly. I am able to help in the building of consensus and able to see the middle ground.

Julie Larsen

Lay
Laguna Niguel, California
St. Margaret of Scotland, San Juan Capistrano
Los Angeles, VIII



I have 20+ years experience as a partner (in two National law firms) designing and evaluating employment practices and litigating discrimination lawsuits. I sat on the LA Disciplinary Board for four years. Currently, as Vice Chancellor, I annually train postulants in Title IV and provide monthly advice to the Disciplinary Board, regarding Title IV processes. I have gained tremendous perspective from the errors I made and hurdles I faced as pro bono co-defense counsel for a bishop in a 2017 hearing and subsequent appeal. I believe my gifts and experiences would diversify and strengthen the Board's ability to balance the analytical and spiritual aspects of Title IV disciplinary processes realizing the overarching goals of reconciliation, justice, compassion for all affected, and clarity about unacceptable behaviors.

Frank Logue

Bishop
Savannah, GA
Georgia, IV



In 1995, Frank responded to a long-felt call to ordained ministry. He entered Virginia Theological Seminary in the fall of 1997. While there, he worked as a seminarian at two area churches, including assisting with the creation of a new Episcopal church—Church of the Spirit in Alexandria, Virginia. He also took part in summer internships with the Anglican Church in Tanzania and St. Elizabeth's Hospital, a large mental hospital in Washington, D.C. In 2000, Victoria, Griffin, and Frank moved to Camden County, spending 10 years starting King of Peace Episcopal Church and its preschool. From 2010 until becoming Bishop of Georgia, he has assisted Bishop Scott Benhase in overseeing the clergy and congregations of the Diocese of Georgia as Canon to the Ordinary. Frank has served in church-wide roles including as a member of Program, Budget, and Finance and of the Executive Council.

David Madison

Priest
Fort Worth, TX
Southwestern Association of Episcopal Schools
The Episcopal Church in North Texas, VII



I look forward to serving on The Court of Review, if elected. Currently, I serve as the intake officer for the diocese. I have held this position since Title IV since 2011 and regularly provide training on the canons and the process associated with clergy disciplinary proceedings. My experience as an attorney prior to seminary has been helpful as we work through these matters. This is difficult work—but work that can lead to reconciliation and healing for all parties involved. I am humbled to be called to exercise ministry in this context.

Gayle McCarty

Priest

Memphis, Tennessee

Not presently attached to a specific congregation

West Tennessee, IV



I believe that my legal education and experience coupled with my analytical mind and critical thinking skills equip me well to serve on the Court of Review. Also, having served multiple times on the Disciplinary Board at the diocesan level and as President during my last term, I am familiar with canon law, the importance of respecting such and trusting the process. All of the aforementioned is tempered by good interpersonal skills, respectful listening skills and rational decision making abilities. My priestly Continuing Education with The Lombard Mennonite Peace Center regarding conflict resolution informs who I am and how I lead. Essential to any court is the need for impartiality. I have no agenda and have never sought to serve on any Disciplinary Board or the Court of Review but have instead been invited to self-nominate each time. Life as an attorney, lay person and now priest, gives me a unique understanding and appreciation of the complex, wonderful world of the Church.

Tracie Middleton

Deacon

Fort Worth, TX

Trinity, Fort Worth

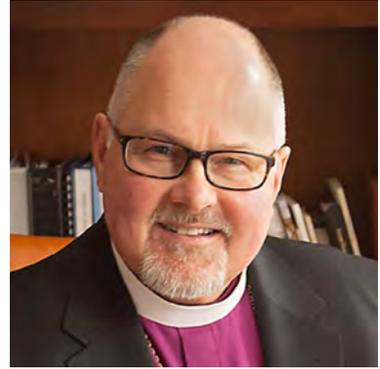
The Episcopal Church in North Texas, VII



I am currently on the Court of Review and previously served on the Disciplinary Board and Commission on Ministry in Fort Worth. I am interested in how processes, such as the church's disciplinary processes, are designed and improved. The re-configuring of Title IV is an ongoing work that I hope to contribute to.

Steven Miller

Bishop
DeFuniak Springs, FL
Milwaukee, V



I have been ordained since 1984 and have been a Member of the House of Bishops since my election as Bishop of Milwaukee in 2003. Throughout my episcopacy, I have worked closely with my chancellors in a number of legal matters and Title IV processes. I hope to continue to offer my gifts in some small where during my retirement .

Russell Randle

Lay
Arlington, VA
Christ Church, Alexandria, VA
Virginia, III



My legal training and forty years of active law practice, including substantial federal court litigation, may prove helpful to the Court of Review. That work includes helping to write federal court opinions as a judicial law clerk. In private practice, my most notable cases have involved negotiation of equitable settlements in large complex matters. My service to TEC includes investigation and resolution of several clergy misconduct cases, as well as service as pro bono counsel in criminal proceedings alleging clergy misconduct. That service also includes Executive Council representative (2015-21), six prior terms as General Convention Deputy, President (2001) and Secretary (2000) of the Standing Committee of the Diocese of Virginia, and work on the Virginia Suffragan Bishop Search Committee (2011). This wide service may help provide broad perspective on the issues facing the Court of Review and help the Court to uphold the canons in a way that furthers the Gospel.

Brian Reid

Priest

DuBois, PA

Northwestern Pennsylvania, III



I have been a priest of the church for more than 45 years serving multiple congregations in three dioceses. In Northwestern Pennsylvania, I have served as the President of the diocesan Disciplinary Board since its formation. I also served on its predecessor body for many years. I have a lot of experience in drafting and understanding canon law at the diocesan level having served for many years as the Chair of the diocesan Constitution and Canons Committee. I wrote the first draft of our Constitution and Canons when we rewrote them completely in 2008. I have similar experience at the churchwide level having served on the Constitution and the Constitution and Canons Committees of General Convention. I have served a great many years on the Commission on Ministry. I have a Paralegal Certificate. I believe that I have the necessary gifts of leadership and discernment to continue serving as a Member of the Court of Review.

Grecia Reynoso

Lay

La Romana, Dominican Republic

All Saints Church, La Romana

Dominican Republic, IX



I thank the Lord Jesus Christ for all the blessings I have received, and my parents for teaching me The Way of Love. It has been a wonderful experience for me to work, serve, worship, and Glorify with love, humility, and singleness of heart, giving the best me of what I know. I am a Notarial Attorney with a Doctorate, which I have always put at the service of the Diocese. I leave the same teaching to my daughters and grandchildren, who are also always at the service of their church. I have served in the Diocesan and Local Committee, where I can highlight serving as Constitution and Canons Coordinator and the Disciplinary Board, and currently as Diocese Chancellor for the second time. I have also been part of the Cuban Task Force and the Standing Committee on World Mission. If I am elected, I will give from the fullness of my self and skillfulness.

Gregory Rickel

Bishop
Seattle, WA
Olympia, VIII



I have a good experience both in education (Masters in Health Services Administration) and work experience (hospital administration) as well as Board experience in many and varied organizations. I also hold a Master's in Interpersonal and Organizational Communications which is a skill that helps in both communal and individual communication and joint work. My experience as a priest (23 years) and bishop (13 years) has gifted me with the lived experience for the position on the Court of Review. I offer myself for this position in hopes it is a body that never has to meet.

Phoebe Roaf

Bishop
Memphis, TN
West Tennessee, IV



If elected, I will prayerfully participate in the work of the Court of Review in a spirit of discernment and humility. This work is difficult yet it is a necessary part of ensuring the health of our church. I will strive to balance concern for my brother and sister bishops who are engaged in the disciplinary process with my understanding of our ordination vows and the Constitution and Canons of The Episcopal Church. I will look for opportunities for healing and reconciliation whenever possible.

Brunilda Rodriguez-Velez

Lay
San Juan, Puerto Rico
Saint John the Baptist Cathedral
Puerto Rico, IX

Photo Not
Available

My dual formation as a christian and lawyer provides me the opportunity to bring fairness, justice, recognition of rights and duties and legal impartiality in the search for solutions to conflict encompasses with empathy, christian compassion, nurture, the search within the person soul to promote healing, repentance and reconciliation.

Laura Russell, Esq.

Lay
Guttenberg, New Jersey
All Saints Parish, Hoboken
Newark, II



As attorney representing low income survivors of domestic violence, I have spent my entire career working for justice. As a four-time deputy from the Diocese of Newark, I bring the policies from General Convention to the practice of Title IV. As the current President of the Court of Review, and the President of my Diocesan Disciplinary Board for over nine years, I feel I have the expertise needed for this position. I have been able to help shepherd multiple matters to conclusion. From this, I have come to understand the complexities of Title IV, along with the need to be compassionate, fair and recognize everyone's strengths and challenges. Conclusion does not equal winners or losers, only individuals in need of healing. I believe I have been able to help in that healing, for all parties. I have also chaired and served on various task forces, including task forces working on issues of sexism, sexual harassment and US and international policy. I would be honored to continue to serve.

Kai Ryan
Bishop
Austin, TX
Texas, VII



I have served in ordained ministry in 3 dioceses and 2 others in professional lay ministry over 35 years. (Central Gulf Coast, Dallas, Texas and West Texas and Rio Grande) As Canon to the Ordinary in the Diocese of Texas, I worked firsthand with our Disciplinary Board, Chancellor, and Bishop Diocesan on Title IV complaints and on training those handling Title IV matters. I also worked with persons discerning how to respond to problematic behavior, whether through the Title IV process or other interventions. As Bishop Suffragan, I work pastorally with congregations before, during, and after disciplinary processes and continue to learn how these processes can protect and restore trust and health. Engaging in the church's mission with clergy across multiple diversities (gender, race, ethnicity, generation, theology, sexual orientation) has helped me develop sensitivity to the impact of these differences within the disciplinary process.

Carrie Schofield-Broadbent
Priest
Syracuse, NY
Central New York, II



I minister with the clergy, laity and congregations of our diocese to cultivate and grow dynamic, healthy, invitational congregations and ministries that are relevant to their contexts and deeply rooted in Jesus. Before ordination, I had a career as a Conflict Resolution trainer and consultant. In addition to ministering in parishes of various sizes, I served the diocese as a District Dean, member of the Diocesan Board, creator and coordinator of the Lay Preaching Program, and chair of the Bishop Search Committee. My passions in ministry include: empowering lay ministry, supporting non-traditional paths to ordination, conflict resolution, facilitation, preaching, hearing people's stories, & creative, collaborative ministry. Steeped in prayer and rooted in relationship with God and God's people, I follow Jesus with passion, humility & joy. I seek to serve God through leading with integrity, creativity, and humor as I listen and learn with curiosity, openness and courage.

William Vodrey

Lay
Cleveland, Ohio
St. Paul's, Cleveland Heights, Ohio
Ohio, V



I have been a lawyer in Ohio since 1992. I am, and always have been, passionately committed to seeing that justice is done in all cases - fairly and impartially, without fear or favor, bias or prejudice. I served as a magistrate of Cleveland Municipal Court from 2001-2020, and was sworn in as a judge of the Cuyahoga County (greater Cleveland) Court of Common Pleas on Jan 3 of this year. I was previously an assistant county prosecutor for six years, most of that time in the felony trial division, and before that a legal aid lawyer for two and a half years.

Christopher Wendell

Priest
Bedford, MA
St. Paul's Episcopal Church, Bedford MA
Massachusetts, I



My service to our Church's disciplinary processes is informed by my background as a full-time parish priest, a recently-minted 40 year old, and as someone who has been very active in Disciplinary Board work in my own Diocese and Province, which both have significant Title IV caseload. I served for three years as President of the Disciplinary Board in my diocese, which included review of over 20 matters. I have been involved with three Conference Panels (one as chair), have led trainings in disciplinary canons and process for diocesan clergy, and have been active in the Province I Title IV network. On the church-wide level, I served in the past triennium as an inaugural member of the Court of Review. Additionally, I have served in many other governance roles: Standing Committee, Diocesan Council member, Real Estate Advisory Committee. These have helped me experience more fully the way our church governs itself for mission with integrity, as we live Jesus' Way of Love together.

Chip Whitacre

Deacon
Plymouth, MN
Trinity, Excelsior
Minnesota, VI



I believe myself to be an attentive and compassionate listener; a skill that has served me well as a manager, crisis-line volunteer and as a pastoral presence in my ministry as a Deacon. I have the analytical skills, life experience and maturity to sort through different interpretations of an event or series of events involving competing interests. I have been involved in many such situations as both a Regulatory Affairs professional and a volunteer arbitrator for the Better Business Bureau that have required me to work toward negotiated settlements or to provide an independent judgment. I believe that these skills and my experience with many roles in the Church will help me to be an effective contributor to the work of the Court of Review.

MEMBERS OF THE DISCIPLINARY BOARD FOR BISHOPS

TERM OF OFFICE:

6 years

NUMBER TO BE ELECTED:

5 bishops elected by the House of Bishops, 2 clergy (deacon or priest) and 2 lay persons elected by the House of Deputies

POSITION DESCRIPTION:

The Disciplinary Board for Bishops is a court of the Church to have original jurisdiction over matters of discipline of Bishops, to hear Bishops' appeals from the imposition of restriction on ministry or placement on Administrative Leave and to determine venue issues as provided in Canon IV. 19.5. (This description is taken from Canon IV.17.3.)

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE:

Members of the Disciplinary Board for Bishops should be well-versed in the Canons; understand the goals and processes of Title IV; embrace a process that includes reconciliation as well as justice; and be able to articulate that goal in a way that does not deny or diminish the hurt of those who are feeling wronged. Compassion, dedication to finding solutions/resolutions that uphold the Canons in a manner that serves the overarching goal of reconciliation, and clarity about acceptable/unacceptable behavior are all essential qualities for Board members. Analytical thinking and the ability to balance the letter and spirit of the law are equally essential. It is vital that incumbents have computer literacy and Internet access. Candidates need the ability to keep information confidential and understand that it can be shared only within the guidelines of the Title IV process.

Patrick Bell

Bishop
Coeur d'Alene, ID
Eastern Oregon, VIII



Patrick W. Bell was elected the Bishop of the Episcopal Diocese of Eastern Oregon on December 12, 2015 on the first ballot and was consecrated on April 16, 2016 in Bend, Oregon. Upon consecration Bell became the 1,092nd Bishop consecrated for the Episcopal Church. His primary residence will be in Coeur d'Alene, and he will commute to Oregon to work as the Bishop on a part-time basis.

Bell was born and raised in the northern Palouse region of Washington. Raised as an Episcopalian, Bell became a Pentecostal minister and professor before returning to the Episcopal Church. After completing additional seminary studies he was ordained to the priesthood in 1989 by Bishop Rustin Kimsey and began work at St. Matthew's Episcopal Church in Ontario, Oregon. In 2002 Bell was named the rector of St. Luke's in Coeur d'Alene. Bell is married to TinaMarie Bell, and has five children and eight grandchildren.

Mark Cowell

Bishop
Larned, KS
Western Kansas, VII

Photo Not
Available

As a prosecutor, my first obligation is to seek justice which is different from seeking a conviction. I believe that I can distinguish well between finding fault and seeking reconciliation. I have also worked assisting the chancellor and I have extensive history reviewing statutes and canons.

Bradfute Davenport Jr.

Lay
Richmond, VA
Grace & Holy Trinity Episcopal Church
Virginia, III



I served as legal counsel to the Hearing Panel in the Title IV case involving Bishop John Bruno. As such I worked closely with Bishop Herman Hollerith, the President of the HP, and became intimately familiar with the Title IV maze. I attended all meetings and telephone conferences of the HP, as well as the three day trial. I drafted the HP's orders, including most of its 90+ page final order deciding the case. I also worked closely with David Beers and Mary Kostel in connection with the Presiding Bishop's Partial Restrictions on Bishop Bruno's Ministry while the case was pending and with Bishop Waynick and her counsel when Bishop Bruno appealed the HP's sanctions order. At Bishop Hollerith's request I attended the pre-trial depositions of several witnesses, to maintain order if necessary. When Bishop Bruno appealed I also conferred several times with the legal counsel to the Court of Review to explain some of the procedural history of the case. I am Church Attorney in Virginia.

Rodney Davis

Priest
Carmichael, CA
Saint Michael's Episcopal Church, Carmichael, CA
Northern California, VIII



I have served as the president of the Joint Disciplinary Board of the Dioceses of California, Northern California, El Camino Real, and San Joaquin. In that role I acquired knowledge of the standards and goals of Title IV and have applied them in disciplinary proceeding that were before me. Because of the broad jurisdiction of the Joint Board, consisting of four distinct dioceses, I have participated in the application of Title IV in a number of varied settings and cultures. Over the course of my life, I have acquired the perspective and experiences of a judge, lay leader, and priest. That has been valuable in applying Title IV in a manner that strives for reconciliation as well as justice, and treats both those accused of misconduct and their accusers with dignity, respect, and compassion. My interest in and involvement with professional ethics is longstanding and has led to service on judicial disciplinary panels.

Martin S. Field

Bishop
Kansas City, MO
West Missouri, VII



While I am not an attorney nor "learned in the law", I am a student of our Canons, and more particularly of their underlying values and purposes. I believe wholeheartedly that the disciplinary canons of Title IV must be administered in an atmosphere of pastoral care and compassion for all parties that may come into dispute or who may have caused or received harm. I have participated in Title IV actions on several occasions during my time as Bishop of West Missouri, and I have been able to ensure in each case that all parties are heard, all pain and sorrow acknowledged, and long-term reconciliation is sought.

William Fleener Jr.

Lay
Grand Ledge, MI
St. David's Lansing
Western Michigan, V



I have attended 7 general conventions and have been the co-chair of our deputation for the last 3 general Conventions. I have served several times on the Joint Standing Committee on Program Budget and Finance. I have also served on the other Standing Committees and other Committees at General Convention. I have also served on the Court for the Trial of Bishops and the Joint Nominating Committee for the Presiding Bishop. I am a member of St. David's Lansing and have served on the vestry of every parish I have attended as an adult. I have been the Chancellor for the Diocese of Western Michigan since 1994 and have recently been named Chancellor for the Diocese of Eastern Michigan. My wife and I also coordinate out diocesan your camp program. I am a law professor and coordinator of the externship program at WMU-Cooley Law School. I share my home with my wife, two adult children, a sister-in-law who is an adult with a disability, 4 dogs and a cat.

Thomas (Tom) Hahn

Lay
Arlington, VA
Christ Episcopal Church, Alexandria, Virginia
Virginia, III



If elected, I'd contribute clergy discipline (Title IV) proceeding experiences along with other relevant professional and ministerial experiences. These include: (Disciplinary/Judicial/Investigatory) - Multiple Title IV diocesan appointments as clergy or complainant's advisor; Federal executive appointment as Administrative Judge; U.S. Congressional Counsel advising members conducting national security oversight investigations; Annual ethics training as active Virginia Bar member: (Title III Ministries) - Co-chair of both Virginia's Commission on Ministry and the Spiritual Discernment Committee, and spiritual discernment community facilitator: (Parish/Church Experience) - Multiple parish ministries and EfM graduate/current co-facilitator; Member of Kanuga Visitors. As a Board member I'd strive to use the experiential gifts given me for effecting just application of both the letter and spirit of the Canons to realize "reconciliation among all involved or affected." (IV.1)

Susan Haynes

Bishop
Newport News, Virginia
Southern Virginia, III



As a former mental health professional, I have a thorough understanding of the dynamics of human behavior and competency in interpersonal relationships. I am comfortable one-on-one or in groups. I am able to weigh the facts, feelings and merits of an issue from several different angles. I believe that all occasions of interpersonal conflict and disruption are an invitation from the Holy Spirit to work for reconciliation and to be better formed for God's Kingdom. As a person of deep prayer, I rely on that Spirit to guide and direct deliberations and listenings. As a non-anxious presence, I am grounded in the patience to listen and be deliberate and intentional in taking action, drawing firm boundaries, and expressing compassion. My experience in Diocesan leadership as both a Presbyterian and a Bishop has adequately acquainted me with Title IV.

d'Rue Hazel

Deacon
Columbia, SC
Diocesan Staff
Upper South Carolina, IV



As a Deacon, diocesan staff member and Title IV Officer, I have fully engaged the work of reconciliation which lies at the heart of restoring all people in unity of God and each other in Christ. It is the focus of our Disciplinary Canons. The act of, or the willingness to be restored, is therefore central to this difficult and sensitive work. Having served as a Diocesan Title IV Officer and Reference Panel member for the last eight years, I have constantly pursued personal growth and development for competently participating in this restorative work of the Church. This has included disciplined work toward practiced proficiency in and knowledge of the Title IV Canons, Bowen Family Systems, Mediation Skills, Conflict Resolution, and Facilitator Training, bringing them effectively and compassionately to bear when receiving complaints. I have made it a particular priority to give proactive attention to my own emotional, spiritual, and physical health, enabling me to take part in this ministry as a healthy self-differentiated leader.

Dorsey Henderson Jr.

Bishop
Mount Dora, FL
St. Edward's Episcopal Church, Mt. Dora, Florida
Upper South Carolina, IV



Juris Doctor Degree from the University of Florida College of Law
Member, Florida Bar (inactive)
Chair of Constitution and Canons, Diocese of Southeast Florida and Fond du Lac
Former Member, Standing Commission on Constitution and Canons
Former Member, Task Force to revise Title IV Canons
Former Member, General Convention Committee on Canons
Presiding Judge, Province IV Court of Appeal
Attorney and Staff Director, Florida Joint Legislative Commission on Migrant Labor
Member and former President, Disciplinary Board for Bishops

Michael Hunn

Bishop
Corrales, NM
Rio Grande, VII



The Title IV process is a chance for the church to practice what we preach about the justice, love and forgiveness of the risen Christ. I served Diocese of North Carolina as Canon to the Ordinary, Canon to the presiding Bishop, and now serve as Bishop of the Diocese of the Rio Grande. In each of these positions I have worked many Title IV cases. I led the effort by which the Diocese of North Carolina adapted its discipline system when the "new" Title IV process came into being in 2009. Twice I have taught Canon Law and Title IV to seminarians at the Anglican House of Studies at Duke University and I have consulted with various dioceses and bishops on the handling of particular cases and on how to set up their discipline processes. My views on implementing Title IV are found in <https://www.titleiv.org/>.

Gregory Jacobs

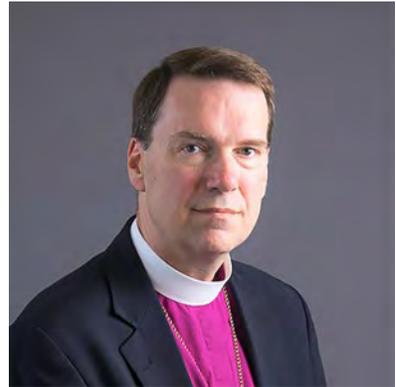
Priest
Durham, North Carolina
St. Titus Episcopal Church
North Carolina, IV



I have served the Church for 20 years in matters involving Title IV clergy misconduct. As a member of the Constitution & Canons Committee, I helped refine and clarify canonical language adopted in the initial Title IV provisions, working closely with diocesan chancellors. For 15 years, I served as the principal Title IV Intake Officer in both the Dioceses of Massachusetts and Newark. My responsibilities included initial intake, interview of all parties/witnesses, and investigation of more than a dozen Title IV allegations brought against clergy. My work culminated in reports to disciplinary review panels in which I summarized the results of investigations and recommended appropriate responses. I participated in later stages of Title IV cases, including conciliation/resolution efforts with clergy and injured parties. I was also responsible for communicating and implementing Title IV's provisions in these dioceses. In 2019, I co-led a Title IV workshop for newly-elected bishops.

Nicholas Knisely

Bishop
Providence, RI
Rhode Island, I



I have served for the previous six years as a member of the Board of Discipline for Bishops, and have been part of two hearing panels. I am familiar with the work and would like to continue so that I can use the experience to further serve the Episcopal Church.

Chilton Knudsen

Bishop
Catonsville, MD
Washington, III



I've served as a bishop in six different dioceses. I was the Title IV intake person in most of those. I served on the Court of Review for the trial of a bishop. I served as an appointee to the Disciplinary Board for Bishops because one bishop had to be recused; I have heard one case. I am able to master a large amount of written material and have experience in human relations. I have also served as a Trustee of the Church Pension Fund and am able to handle sensitive material with integrity.

Julie Larsen

Lay
Laguna Niguel, California
St Margaret of Scotland, San Juan Capistrano
Los Angeles, VIII

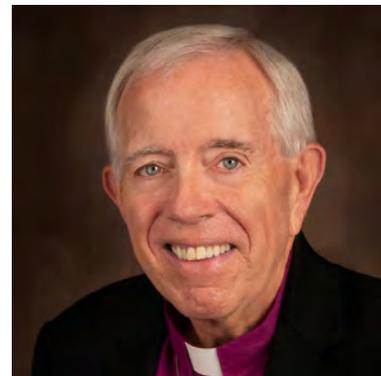


I have 20+ years experience as a partner (in two National law firms) designing and evaluating employment practices and litigating discrimination lawsuits. I sat on the LA Disciplinary Board for four years. Currently, as Vice Chancellor, I annually train postulants in Title IV and provide monthly advice to the Disciplinary Board, regarding Title IV processes.

I have gained tremendous perspective from the errors I made and hurdles I faced as pro bono co-defense counsel for a bishop in a 2017 hearing and subsequent appeal. I believe my gifts and experiences would diversify and strengthen the Board's ability to balance the analytical and spiritual aspects of Title IV disciplinary processes realizing the overarching goals of reconciliation, justice, compassion for all affected, and clarity about unacceptable behaviors.

James Magness

Bishop
Virginia Beach, VA
Southern Virginia, III



I have dealt with and processed disciplinary matters as the Bishop Pro Tempore of Southern Virginia, as the Bishop for the Armed Forces and Federal Ministries and, during my Navy career, as a senior Naval officer (for the entire Navy Chaplain Corps).

Kevin Nichols

Bishop
Bethlehem, PA
Bethlehem, III



I believe that my diverse experience in the business world, parish ministry, diocesan leadership, and now as a Bishop offers me insight into the complexities faced by leaders especially during the most fragile moments of one's life and ministry. I believe that I would bring to the Disciplinary Board a listening heart and pragmatic approach to the Title IV matters that might come before us. Prayerful discernment and attention to detail are two qualities that I would bring to each matter. Issues of confidentiality, accountability, and justice need to guide our work and hopefully lead us toward reconciliation and healing. It would be an honor for me to serve the wider Church on the Disciplinary Board for Bishops.

Christopher Wendell

Priest
Bedford, MA
St. Paul's Episcopal Church, Bedford MA
Massachusetts, I



My service to our Church's disciplinary processes is informed by my background as a full-time parish priest, a recently-minted 40 year old, and as someone who has been very active in Disciplinary Board work in my own Diocese and Province, which both have significant Title IV caseload. I served for three years as President of the Disciplinary Board in my diocese, which included review of over 20 matters. I have been involved with three Conference Panels (one as chair), have led trainings in disciplinary canons and process for diocesan clergy, and have been active in the Province I Title IV network. On the church-wide level, I served in the past triennium as an inaugural member of the Court of Review. Additionally, I have served in many other governance roles: Standing Committee, Diocesan Council member, Real Estate Advisory Committee. These have helped me experience more fully the way our church governs itself for mission with integrity, as we live Jesus' Way of Love together.

THE EXECUTIVE COUNCIL

TERM OF OFFICE:

6 years

NUMBER TO BE ELECTED:

6 lay persons, 2 presbyters or deacons, 2 bishops

POSITION DESCRIPTION:

The Executive Council is the Board of Directors of the Domestic and Foreign Missionary Society (DFMS) (Title I, Canon 3 (Article II, Constitution of DFMS)). In addition, Members carry out the program and policies adopted by the General Convention and have charge of the coordination, development, and implementation of the ministry and mission of the Church. The Executive Council is required to manage the budget of the Church, to submit to General Convention a budget for the next triennium, and to make annual reports to the Church of receipts and disbursements and a statement of all trust funds and properties. (Title I, Canon 4). The Council does its work within four standing committees: Finance, Governance and Operations, Mission Beyond the Episcopal Church, and Mission Within the Episcopal Church.

Standing Committees and Task Forces of the Council may meet either by teleconference or in person for two or three days excluding additional travel time in the interim between Council's regular meetings (see Canon I.4. Appointments may be made to some Interim Bodies as liaisons). Members are expected to attend all meetings, unless otherwise excused, and to come to all meetings prepared for the work ahead including reading all reports and other materials sent to members in advance of meetings.

QUALITIES & COMPETENCIES AND NOMINEE SHOULD HAVE:

All nominees must have a commitment to this ministry and the time to participate fully. Council members need a deep commitment to God's mission in the Church and world, strong faith, openness to new ideas, flexibility, the ability to communicate in small and large groups, the capacity to engage with staff members from the Episcopal Church Center, and a broad perspective of the Church on a local and global scale.

Nominees should have a broad, compassionate understanding of the needs of The Episcopal Church, and a strong commitment to the Church's mission and ministry. We seek and strive for diverse voices and skills appropriate to our mission.

Specific skills and gifts are desired in the areas of: 1) evangelism, racial reconciliation or stewardship of creation; 2) understanding of the workings of the Anglican Communion and The Episcopal Church; 3) finances and budget management; 4) organizational development; 5) the fiscal and fiduciary duties of corporate directors; 6) proven advocacy skills; and 7) good communication abilities, as well as abilities in the planning, implementation and completion of assignments.

Dianne Audrick Smith

Lay
East Cleveland, OH
St. Andrew's Episcopal Church, Cleveland
Ohio, V



As a lifelong Episcopalian my professional and volunteer career in the church at parish, diocesan and church-wide levels includes managing/developing organizational budgets, developing bylaws, drafting procedures to guide groups, and providing expertise in fund development. At GC 2018 I served as Chair of the Ohio Deputation and as a member of the Cuba Committee. My leadership at the national and local levels was developed through my service as national officer in UBE, through relationships built at CDSP and as a trustee of the General Theological Seminary. Serving as presenter and host, my public speaking includes small and large groups. As a deep listener to young adults and mentor/supporter, I encourage them to participate more broadly in the activities of the parish, diocese and TEC by "sharing my story." I offer my skills in understanding church polity and politics, advocacy for the least of these, an ability to cull action from visions, and service to church and community.

Cody Bro

Lay
Phoenix, Arizona
St John the Baptist, Glendale
Arizona, VIII



I have been blessed to have been elected to a series of oversight and leadership roles, each with increasing responsibility in the Episcopal Church; vestry, standing committee, deputy to general convention. In each of these roles I have been an unabashed advocate of doing things the right way, not necessarily the easy way. I take the time to know the goings-on of The Episcopal Church, and the wider Anglican Communion. I believe that God is calling me to use my younger generational voice to provide The Episcopal Church with the perspective of the next generation. Now more than ever we need to explore ways to use technology to expand our Gospel mission of mission to reach, expand and grow The Episcopal Church of the 21st Century.

Annette Buchanan

Lay
Neptune, New Jersey
St. Augustine's Church, Asbury Park
New Jersey, II



My journey as a faith leader began at St. Augustine's Church in Asbury Park, NJ. Of importance, my call to leadership was reinforced by improving my spiritual practices of prayer and study. I served on several committees and joined the leadership when elected as Vestry member and Junior Warden. I became a delegate to Diocesan convention and served on Diocesan Council among other diocesan responsibilities increasing my knowledge of the Episcopal Church. My major concern in the church was the need for social justice programs. Fortunately, I was introduced to the Union of Black Episcopalians and was inspired by their advocacy work. Within UBE, I was mentored as a lay leader, and became the National President. My advantage was that skills honed in corporate life were transferrable to ministry within the church. These gifts of strategic planning, program management, collaboration, I believe are well suited to serve the Executive Council in the challenges and opportunities we will face.

Luz Cabrera Montes

Priest
Houston, Texas
Iglesia Episcopal San Mateo (Sponsoring) &
Trinity Episcopal Church (Curacy)
Texas, VII



My ability to connect with others, in authentic and meaningful ways, is a skill that would allow me to effectively contribute to the key areas of The Executive Council. I am passionate and committed to God's mission, and as a Latina in the church, I recognize the importance of understanding the unique needs of The Episcopal Church. My experiences have taught me to relate and effectively work with different groups of people and have been a part of the many ministries of the Church. I am responsible and committed to working with others and acknowledge that we are all gifts to this Church. I am creative and have witnessed different forms of worship and know the gift that this is. I advocate for justice and I'm not afraid of asking questions that may be uncomfortable. I would use my gifts to do this work intentionally and in authentic ways that represent all the voices of this Church.

Thomas Chu

Lay
Bridgehampton, NY
Episcopal Church of Our Savior, Manhattan
New York, II



Since confirmation as a young teenager, I have sought and found ways to engage God's mission through The Episcopal Church, first as a volunteer, then as an administrator in several churches through high school and as a student chaplain at Columbia University. For over 18 years I was privileged to serve in congregational development, young adult and higher education ministries, and ministries with young people, working with Executive Council and General Convention committees, ecumenical and global networks. During these years, I strongly advocated for including and empowering younger and new voices in the church, a commitment which I continue. Later I found my current calling as an estate planner, I built a practice addressing the needs of small business owners and older clients. Blessed with new skills and gifts to offer the church and as a member of Generation X, I belong to a hinge generation to navigate to a new future, and would be honored to serve.

Joseph Clavijo III

Deacon
Metairie, Louisiana
St. George's Episcopal Church
Louisiana, IV



The Rev. Joseph Clavijo serves as deacon at St. George's Episcopal Church in New Orleans, and is chair of the Bishop's Environmental Commission for the Episcopal Diocese of Louisiana. He serves as chair for the "Greening our House of Worship" committee for the Greater New Orleans Interfaith Climate Coalition. In community, Joseph serves as volunteer chaplain at Tulane Medical Center and is a board member serving with Grace at the Greenlight, a ministry providing meals and services for the unhoused in New Orleans. Joseph recently completed a certificate program from The University of the South; "Contemplation and Care for Creation" and is organizing events within the diocese and interfaith community where participants will encounter the sacred in nature, interpret that experience, and reflect on its implications for their own lives and society. He and his wife Donna have two adult children. They spend considerable time involved in music and the arts and enjoy spending time in creation at Audubon Park and City Park.

DeDe Duncan-Probe

Bishop
Liverpool, NY
Central New York, II



The work of The Executive Committee connects with my deepest theological understanding of Jesus Christ's Way of Love, most notably in the committee's work for evangelism, racial reconciliation, and creation care. The stated 'Qualities and Competencies' of a nominee, are commiserate with my demonstrated skills of organization, vision setting, implementation, creativity, and collaborative leadership. In terms of experience and training, I have been blessed to serve on a number of diverse governing boards, including my current role as Vice-President of Province II. In my vocation as bishop and as co-founder and Vice-President of CA AeroComm Corporation, a well-established consulting firm in the aerospace industry, I have had an opportunity to work with diverse groups of people, focused on executive strategies for sustainability, inclusivity and empowerment, and adaptive growth.

William Fleener Jr.

Lay
Grand Ledge, MI
St. David's Lansing
Western Michigan, V



I have attended 7 general conventions and have been the co-chair of our deputation for the last 3 general Conventions. I have served several times on the Joint Standing Committee on Program Budget and Finance. I have also served on the other Standing Committees and other Committees at General Convention. I have also served on the Court for the Trial of Bishops and the Joint Nominating Committee for the Presiding Bishop. I am a member of St. David's Lansing and have served on the vestry of every parish I have attended as an adult. I have been the Chancellor for the Diocese of Western Michigan since 1994 and have recently been named Chancellor for the Diocese of Eastern Michigan. My wife and I also coordinate our diocesan youth camp program. I am a law professor and coordinator of the externship program at WMU-Cooley Law School. I share my home with my wife, two adult children, a sister-in-law who is an adult with a disability, 4 dogs and a cat.

Timothy Gee

Lay

Palo Alto, California

Saint Andrew's Episcopal Church, Saratoga, California

El Camino Real, VIII



As a candidate for the Executive Council, I offer my proficiencies in leadership, administration, management, organizational and legal analysis, and group collaboration in service to our Church. I developed these skills during my years in court management, contracts administration, legislative analysis, church leadership, non-profit and community leadership. As a third term deputy and member of several Joint Committees, including Program, Budget & Finance, I am familiar with our Church's mission, structure and governance. I will endeavor to apply my experience, skills and knowledge in the Committee's deliberations and to promote the key ministries and missions of church planting, racial reconciliation, care of creation and responsive governance. In light of my experience and commitment to the mission and ministries of our Church and of the Jesus Movement, I would be honored to share my gifts with the wider church and ask for your support of my election to the Executive Council.

Charles Graves

Priest

Houston, Texas

Houston Canterbury Campus Ministry

Texas, VII



As an appointee currently serving on Executive Council, I am well suited to continue in this critical ministry. I am a Millennial African-American priest who as a college missionary is dedicated to raising up the new leaders of the Church. In this capacity, my ministry focuses on discipleship, evangelism and building the Body of Christ for the future. Having served in one Standing Committee, two Diocesan Councils, three General Conventions, boards in four dioceses and parishes in five dioceses, I am well equipped for the Councils of the Church in leading God's people forward. I have served in Episcopal/Anglican ministries in Italy & Ghana, am proficient in Spanish, Italian & English, and have years of experience in both black ministries and Latinx & immigrant ministries as well. Also as a former U.S. Senate aide, I have a highly detailed knowledge of the political and social justice climate in which our church operates, and the increasingly powerful advocacy of the Episcopal Church.

Scott Haight

Lay
Dyersburg, TN
St. Mary's Episcopal Church - Dyersburg
West Tennessee, IV



I have been blessed and honored to serve in numerous leadership roles at the local, diocesan and national levels of our Church. My experience in communicating, writing, listening, and analyzing church issues over a 25-year span, and my 34+ years of practicing business law, is what I can bring to Executive Council. I am a Deputy to 3 GC's, and First Alt. twice. I have served both my Diocese and Parish in many senior leadership roles. I trust the collective wisdom of fellow Church leaders drawn from all orders, backgrounds, and walks of life-wisdom reflecting the diversity of our Church. I am dedicated to the diversity, unity and preservation of our Church in ever-changing circumstances and challenges. I believe that it can be a vital force in our lives, communities, country and the world. I believe that my years of leadership experience at the parish, diocesan and national levels of our Church, as well as my legal experience, will benefit the Executive Council in its ministry.

Deborah Jackson

Priest
Hixson, TN
St. Paul's Episcopal Church (Chattanooga, TN)
Florida, IV



Prior to becoming a priest, I had a career in marketing and management in the insurance industry, during which I acquired many skills that inform and amplify my ordained ministry. I currently serve as an associate dean at the School of Theology at Sewanee, a position I began after six years as a parish priest. My work now focuses on formation of church leaders, especially planning orientation for new seminarians and supporting their overall experience. I provide pastoral care, and collaborate with others as needed to ensure an environment of seamless care for the students. I have also enjoyed serving the wider church as the National Chaplain for the Junior Daughters of the King, and as a delegate of TEC to the United Nations Commission on the Status of Women. I have experience in event planning and project management, and I have served on the boards of directors of numerous non-profit agencies. If elected, it would be my honor to serve on this committee, and with God's help, to contribute to the mission of the Church in the world.

Deon Johnson

Bishop
St. Louis, MO
Missouri, V



"A single bracelet does not jingle." I have often used this Congolese proverb as a reminder we were made for community, connection, and collaboration. I currently serve as the Bishop of the Diocese of Missouri and previous to that the Rector of a parish in the Diocese of Michigan. As a bishop and parish priest I am at my best when working with others to affect change. The Episcopal Church is in the midst of transformation. Change always involves naming and grieving what has been, while dreaming and daring about what could be. I hope that my experience in bringing others together could be used on the Executive Council. In this season of naming, grieving, dreaming and daring it would be an honor to serve the wider church as we envision the next normal to which God is call us as form a more Beloved Community.

Clyde Kunz

Lay
Tucson, AZ
Episcopal Church of St. Matthew, Tucson
Arizona, VIII



A former investment advisor, I have since worked in the nonprofit sector for 30 yrs. primarily in areas of Governance and Fund Development (which I have taught through a university-based center on NPO management). An honorary Canon, I served as a PB-appointed Director of ECF, now as a Director of Forward Movement and on the Standing Committee for the Diocese of AZ. I am Coordinator for EfM in our Diocese and mentor a weekly EfM group. I am one of four (and the only lay) diocesan intake officers for Title IV complaints and in 2018 chaired the Bishop Search Committee. A delegate to General Convention in 2018, was a member of the Social Responsible Investing & Stewardship Committee. I am licensed as a "Lay Preacher" by the Bishop and am on the parish homiletics rotation approx. every 6 weeks. More than any of the above: I love the Church and hope to serve her using any and all of the skills God has given me, for many years to come.

Joe McDaniel Jr.

Lay
Pensacola, Florida
Christ Church Parish, Pensacola, Florida
Central Gulf Coast, IV



As a Deputy to the 79th GC, I drafted five substantive resolutions, including Doo2, entitled Funding The Beloved Community, which were all passed by the GC. I served on The HOD's Committee on Racial Justice & Reconciliation ("RJ&R") and I was elected to The Joint Nominating Committee to elect The Presiding Bishop. During the 78th GC, I served as the Aide to the HOD's Committee for the Confirmation of The PB. I formally served as The National Vice President for The Brotherhood of St Andrew's Commission on RJ&R. I presently serve as The Co-Chair for the Diocese of The Central Gulf Coast's Commission on RJ&R, and as the Secretary-Treasurer for The DuBose Chapter of the UBE, and I represent the UBE on The Consultation. I practiced Corporate Finance law in New York City and following that was a Principal in an M&A Advisory Firm until retirement in 2010. I possess a J.D. from UVA's School of Law, and an M.B.A. in Finance from NYU and a B.A. in Political Science from FSU, cum laude.

Sandra Montes

Lay
Sugar Land, TX
Trinity Episcopal Church, Houston
Texas, VII



In my life trajectory I have learned patience, organization, discipline and commitment. My parents' example taught me that evangelism, formation, missions and stewardship are vital for church growth (in numbers and in Spirit) and vitality and that budgeting, loving and asking for forgiveness are fundamental. Music and writing taught me creativity, communication and listening skills. I am passionate about authenticity, inclusivity, making room for everyone and learn daily to encourage others to share their voices. Through education and teaching people of all ages, I have learned to teach people with various learning styles and needs. My work as a leader has helped me build and work in cooperative teams. Life as a single madre indigena latina has taught me to prioritize, persevere, manage time, resources and energy and succeed while facing and moving mountains. I was brought up with humility, endurance and faith and knowing we are all related and must use my gifts to help others.

Rafael Morales

Bishop
San Juan, Puerto Rico
Puerto Rico, IX



My academic background and work experiences within the church and at a professional level have provided me with valuable resources in the area of organizational management and pastoral life development. The application of knowledge and experience in the life of the Church has allowed me to develop a pastoral and managerial style that seeks to ensure the harmonious welfare of human and financial resources to expand the mission of the Church. The Diocese of Puerto Rico, which I have been shepherding for the past three years, has faced various natural and social disasters. When these have occurred, the Church has always been present and has taken action for the benefit of those most in need. The formation of a diverse team was key to leading an effective response. These experiences would allow me to present through the Diocesan Council a strong voice of social action and diverse action responses for our Church and for our society.

Sarah Nolan

Lay
Richmond, Virginia
St. Paul's Episcopal Church, Richmond
Virginia, III



Having served many years in a for-profit cooperative start-up and a non-profit/church plant I have developed fiscal management and strategic planning skills (from both success and failure) that help organizations creatively approach their constraints to find innovative and collaborative solutions. As a church planter, former organic farmer, community organizer, communicator, fundraiser and lay chaplain - I hope to bring a perspective that reflects the many ways people engage with The Episcopal Church and the intersectional nature of this work. If elected to Executive Council, I would use the experiences I have gleaned working within cooperative, non-profit and congregational settings to listen carefully, problem solve, vision and seek to equip the wider church to live out the "loving, liberating, life-giving way of Jesus."

Sean Rowe

Bishop
Erie, PA
Northwestern Pennsylvania, III



For more than 13 years as bishop and bishop provisional, I have helped congregations across three dioceses learn to experiment for the sake of the gospel. Together with leaders known for the grit, resilience and determination that characterizes post-industrial communities, I have helped guide our congregations to find faithful ways to be the church in a rapidly changing landscape with diminishing material resources. By striving to privilege gospel impact over our own territorial needs and wants, we have reduced operating expenses and invested our income to support congregations and advance the mission of God in our region. These experiences in resilient, economically challenged dioceses, coupled with my scholarly research in organizational learning and leadership and my long service in churchwide governance, will allow me to contribute strategic thinking and practical experience to Executive Council's deliberations about the hard decisions that now face the Episcopal Church.

Carrie Stepp Graves

Lay
Towson, MD
Episcopal Church of the Redeemer
Maryland, III



God called me to The Episcopal Church as a child. As an adult I found a path to spiritual maturity through EfM and Biblical dream work, and discerned a call to work for the Church. I enjoy ecumenical and interfaith ministry, loving nothing more than to help diverse groups of people work together for a common cause. My range of Church board experience is essential to serving on Executive Council and offers me a deep understanding of the Church's needs. I served as canon staff liaison in Upper SC for the work of racial reconciliation, stewardship of creation, world mission, and outreach. I manage budgets and have honed my advocacy skills in SC and as canon for communications in MD. My group facilitation and communication skills, combined with my spirituality, are my rock. With them I am able to communicate the Gospel in a meaningful way. If elected, I hope to knit together my call and skills to help the Executive Council realize God's dream of the beloved community, individually, communally and globally.

MEMBERS OF THE GENERAL BOARD OF EXAMINING CHAPLAINS

TERM OF OFFICE:

6 years

NUMBER TO BE ELECTED:

3 lay persons; 3 faculty members of theological seminaries or other educational institutions; 3 presbyters with pastoral cures or in specialized ministries; 2 bishops. (HOB elects; HOD confirms elections)

POSITION DESCRIPTION:

GBEC board members write the annual General Ordination Examination (GOE) administered to candidates for eventual ordination as priests. The examination includes tests for proficiency in Holy Scriptures, the history of the Christian church, Christian theology, Christian ethics and moral theology, Christian worship, and the practice of ministry. Writing the GOE includes both composing questions and the associated rubrics for answering those questions; these rubrics are provided to guide candidates as they answer the questions. Board members also evaluate the candidates' answers in the weeks following the administration of the exam. At its meetings, the board, made up of 22 members total, evaluates and plans for the succeeding year's work and oversees the work of the board's paid executive director and testing and professional consultants.

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE:

Nominees should have an interest in theological education and some expertise in one of the six canonical areas. Previous experience on a diocesan Commission on Ministry or as a diocesan examining chaplain is helpful.

Competency in testing methods and procedures is useful. Board members should be able to work comfortably in teams and task groups. GBEC assignments demand ability to concentrate intently on tasks at hand. It is vital that applicants have computer literacy, Internet access, and the ability to work online with others.

Laura Ahrens

Bishop
West Hartford, CT
Connecticut, I



I have served on the GBEC for several years. I bring to this position a knowledge of the present process, a dedication to the work of formation for those seeking orders in TEC, and a passion for exploring how the GOE's and other tools can support our work in God's mission. The gifts and skills of clergy needed to serve the Church of 21st century should be grounded in our traditions and should also serve the present day context. I bring passion, reflection and diocesan wide experience on the exploration to this conversation. I would look forward to working with the GBEC on how the GOE's can best serve this work.

Martha Alexander

Lay
Charlotte, NC
Christ Church Charlotte
North Carolina, IV



Since 2003 I have served as a deputy from the Diocese of North Carolina to the General Convention and served on various committees. At the 78th General Convention I was Chair of the Legislative Committee on World Mission and I served as Chaplain to the Legislative Committee on The Episcopal Church in Cuba at the 79th General Convention. I have been a reader for the General Ordination Exams and am currently serving on The Church Pension Fund Board of Trustees, the Executive Council Committee on Historically Black Colleges and Universities, the Global Episcopal Mission Network Board and as the Companion Coordinator for Province IV. Over the years I have had the opportunity to work in the church with a diversity of laypeople, priests, deacons and bishops. I am committed to learning, discussing and reflecting on the issues before us and keenly listening to the many creative voices within the church. And, I will bring thorough and prayerful consideration to all matters.

Michael Bamberger

Priest

Sierra Madre, CA

Church of the Ascension

Maryland, IX



I have served as a reader of the GOEs for about 30 years, and was elected to the Board in 2015. I have served on the question writing teams for the areas of Theology and Ethics, and I have been the trainer for evaluation of the areas of Ethics and Church History. I am committed to the process of fairly administering and evaluating the exam. I made it possible for the exam to be administered in Spanish.

Katharine Black

Priest

Boston, MA

The Cathedral Church of St Paul

Massachusetts, I



The GOE has changed radically from when it was a pre-professional test like the bar exam. Formerly, there were two parts: academics to demonstrate knowledge, and Coffee Hour Questions to reveal pastoral skill on questions people really ask. Our current goal is to show Bishops and Candidates whether Candidates are ready to be ordained. My commitment to GOEs is year-round, framing and honing questions to reflect the annually changing exam. I'm particularly adept in designing clear, often imaginative, questions in every area that can be answered with entry level Proficiency. I have a wry sense of humor useful for editing and discussing questions either too broad or too vague. In 7 different venues, I have been paired with a variety of readers who consistently report feeling welcomed and valued. Finally, I bring both enthusiasm and energy, delighting in each part of the process: actual meetings, imagining and shaping questions, reading responses, and working with new and experienced readers.

Stewart Clem

Priest

St. Louis, MO

The Church of St. Michael & St. George

Missouri, V



As a theologian by training, I am deeply invested in theological education, and my desire is for our ordinands to be fully equipped for ministry in a rapidly changing cultural landscape. At Aquinas Institute of Theology, I teach a diverse body of students who are preparing for ministry in all its forms: lay, ordained, and vowed religious. My courses cover foundational aspects of moral theology as well as specialized topics, including social ethics and health care ethics. I also have expertise in the history of Christianity, with an emphasis on Christian moral and political thought in the Middle Ages through the early modern period. I have taught over a dozen graduate and undergraduate courses, honing my skills at administering and grading exams and essays. As a parish priest, I am active in catechesis and adult education, as well as formation programs for aspirants and postulants. I hope to bring my experiences as a seminary educator, priest, and moral theologian to serve the GBEC.

L. Zoe Cole

Lay

Denver, CO

St. Andrew's

Colorado, VI



Theology is not the specialty of ivory towers and dusty corners, it is the privilege and responsibility of all the people of God. My lifelong interest in education and formation has guided my work in the church and the secular world. I have worked with laity and with clergy in a variety of calls and ordained vocations, in designing, implementing, and evaluating corporate compliance, ethics, legal and religious education. Recently, this interest resulted in my completing a PhD in religious and theological studies, focused on theology/theological anthropology, philosophy, and cultural theory. My church-wide involvement has also helped me to understand the needs and structure of many different levels and areas of church ministry and governance. I believe I bring the requisite skills and experience to work independently and in teams to help assure that candidates for ordained ministry within are adequately prepared for their various ministries within and on behalf of the church.

Christopher Corbin

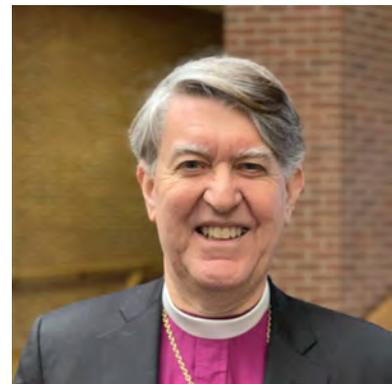
Priest
Lead, SD
Christ Church, Lead
South Dakota, VI



The first thing that would make me a good fit for the General Board of Examining Chaplains is my academic background: I have a PhD in theological studies from Vanderbilt University where I focused on Anglican theology and history. Second, my ministerial work has been dedicated to local formation and congregational development. My familiarity with the most recent academic theology and church history will allow me to help create appropriately rigorous questions for evaluating candidates for ordination in today's Church. At the same time, my work in local congregational development will let me evaluate for more than academic knowledge-I can assess the ways in which candidates can apply theological and historical knowledge and skills in ways that lead to flourishing ministerial contexts. Finally, much of my professional work has taken place in Native American ministerial contexts, which gives me some sensitivity to non-dominant or non-Western forms of learning and ministry.

R. William Franklin

Bishop
New York, NY
Long Island, II



I have previously served between 2012 and 2018 on the General Board of Examining Chaplains. In addition, I have served as Chair of the History GOE Question Writing Committee. In 2021, I served as a Bishop Second Reader of Not Proficient GOE papers. I have experience of being a long-time professor at Episcopal seminaries, a seminary Dean, and a diocesan Bishop. So, I am knowledgeable in dealing with the intersection of academic life and ordained ministry in our Church.

Rosalind Hughes

Priest
Bay Village, OH
Church of the Epiphany, Euclid
Ohio, V



I am honored to stand for election to the Board of Examining Chaplains. I hold an MA in Theology from Oxford University and an M.Div. from Bexley Hall. I believe that my academic grounding in the required canonical areas is solid. I currently serve as convener of our Diocesan Liturgical Task Force and I am active in developing our gun violence prevention education and response. As a friend, colleague, and as Chair of our Diocesan Examining Chaplains, I have advised General Ordination Exam candidates to answer the examinations prayerfully and imaginatively, projecting themselves into their future as a priest in Christ's church. The formation of faithful ministers of the gospel has been a gift that I have enjoyed and which I love to share with others. It is this combination of academic foundation with some pastoral experience and imagination that I think qualifies me to be of use in this ministry, both in crafting questions and interpreting answers; always and only with God's help.

Adam Kradel

Priest
Carlisle, PA
St. Johns Episcopal Church
Central Pennsylvania, III



I am parish priest, ordained 20 years, who also has a PhD in American Politics from a top 10 program (University of Wisconsin-Madison). I have used this to help construct the Church and Society question for the GOE and then Practice of Ministry. In recent years I have worked on the Worship question, which is fitting for me as I spend time curating liturgy every day. My years working in academic has enabled me to understand the strength and limitation in evaluation of essays, which has help me make regular contributions to both the construction of GOE question and the evaluation of completed essays.

Rhonda Lee

Priest
Durham, NC
N/A--diocesan staff
North Carolina, IV



Ordained in 2005, I have served as a university chaplain, a parish priest, and, since 2014, a regional canon in the Diocese of North Carolina. I have been a member of our Commission on Ministry for the Priesthood and our Disciplinary Board, and am now a trainer for both Safeguarding God's Children and Dismantling Racism. With a PhD in U.S. history, I have taught undergraduates at Duke, and lectured on preaching, stewardship, prayer, and pastoral care around suicide at Duke Divinity School. As a scholar, I study protest movements and the ethics of violence; my published personal essays focus on everyday discipleship.

Anne LeVeque

Lay
Takoma Park, MD
Ascension, Sligo Parish, Silver Spring, Maryland
Washington, III



Most helpful to the Board would be my skill in writing exam questions to assess students' learning; my broad experience in equipping clergy and laity to thrive in ministry in peaceful times and in conflict, in a pandemic and in whatever comes next; and my experience, as diocesan staff, of working cooperatively to develop and realize a vision for shared ministry.

Jane McCamant

Lay
Chicago, IL
St. Paul and the Redeemer
Chicago, V



I am a sociologist of religion and morality and would bring that substantive expertise to the work of the GBEC. I received my PhD in 2020, and am currently a Social Sciences Teaching Fellow in the Department of Sociology and the College at the University of Chicago. My own research expertise is in the history of moral and religious education, and I have studied moral philosophy and the history of theological ethics. As a teacher I design and evaluate countless written assignments, and I have familiarity with double-blind review processes through my work with the American Journal of Sociology. I would also bring to the GBEC experience of the discernment and ordination process. Since 2018 I have served on Chicago's Commission on Ministry, and since January 2020 as vice-chair. Serving on the search committee for the 13th bishop of Chicago has also given me experience of consensus-based work using both online and in-person collaboration.

Hugh Page Jr.

Priest
Mishawaka, IN
Holy Trinity Episcopal Church - Westside Ecumenical Clericus
Northern Indiana, V



I am scholar of the Hebrew Bible / Old Testament with close to three decades of research and teaching experience in the discipline. I have been a GOE reader in the past and am completing my first term as an elected member of the General Board of Examining Chaplains. My research interests in the broader area of biblical studies focus on Hebrew Poetry, the interpretation of the Bible in the Africana world, and the comparative study of biblical and ancient Near Eastern lore - and the implications thereof for contemporary theology.

Jason Poling

Priest

Reisterstown, MD

St. Andrew's Episcopal Church (Pasadena, MD)

Maryland, III



I believe very strongly that when clergy "do solemnly engage to conform to the doctrine, discipline and worship of The Episcopal Church" they should know what they're getting into. That is what theological education is about: preparing our students for the work of ministry as priests in our Church by giving them a sense of what that work is and equipping them to do it. The GOEs are a means of determining whether that preparation has been done, and in making that determination they serve both postulants and our Church.

I have received theological education (M.Div., M.A.T (Biblical Studies), D.Min.) in both ecumenical and denominational seminaries, and I earned my S.T.M. in Anglican Studies at General Theological Seminary during the eventful 2014-2015 academic year. In addition to serving as Priest-in-Charge at a parish in the Diocese of Maryland, I currently have the privilege of serving as the founding Director of the D.Min. program at St. Mary's Ecumenical Institute in Baltimore.

Carla Roland Guzmán

Priest

New York, NY

Church of Saint Matthew & Saint Timothy

New York, II



I am passionate for theological formation and, in particular, church history. I have a MA degree in Church History (Early Church) and a PhD in Theology with a focus on Church History and Methodology (Early Modern Transatlantic). I have served for several years as a diocesan examining chaplain for the Diocese of New York. I am currently an Affiliate Faculty in Church History at The General Theological Seminary--I teach introductory church history courses, currently Early Modern to the Present; I have also taught courses on Decoloniality and History of the Episcopal Church. I always aim to connect church history to preaching and teaching, and to our breadth of tradition and liturgy, including the BCP. Moreover, I am fully bilingual (English and Spanish). Finally, I have also written a book on Episcopal Church history, specifically, the institutional history of ministry to, with, and among Latinx persons and communities.

Kirk Smith

Bishop

Sedona, AZ

Retired Bishop of Arizona, attend St Andrew's Church, Sedona, AZ
Arizona, VII



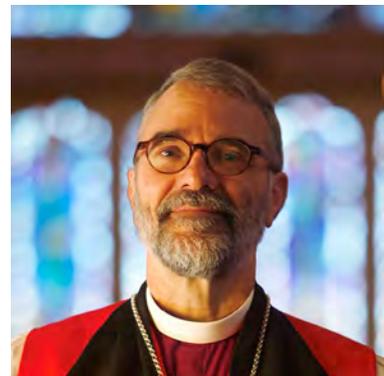
As a recently retired bishop and former academic (Cornell Ph.D), I am particularly interested in how the church educates both clergy and lay leaders for the future. In 2019, I had the privilege of being a visiting professor of church history at General Seminary and at Yale Divinity School in the Spring of 2021. It was exciting to be in places which do traditional academic formation so well, with strong engagement with the urban environment. However, as a bishop, I am also concerned that the church provide opportunities to train and support those who cannot do a three year residential program. The Diocese of Arizona created such a successful program for non-stipendiary local priests. I am also concerned that ministry candidates engage intellectually with challenges from the scientific and psychological communities, and that we respond effectively to the current immigration crisis. Overall, our formation process needs to give more attention to Hispanic Ministry, Youth, LGBT folks and other groups historically neglected by the church.

George Sumner

Bishop

Dallas, TX

Dallas, VII



I have a Ph.D. in systematic theology from Yale, have taught at the seminary level, and have a publishing record, some of it on Anglicanism. I was the head of a seminary for 16 years. As a bishop I am involved in the ordination discernment process.

Edythe (Edie) Wakevainen

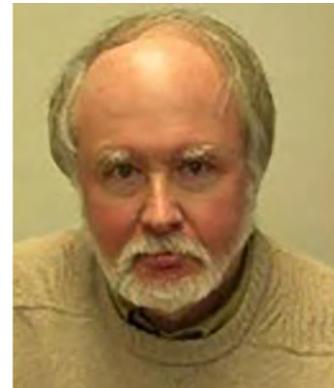
Lay
Clinton Township, MI
Grace Episcopal Church, Mt. Clemens
Michigan, V



I am a learner and a teacher. I have a PhD in Psychology, as well as a Certificate in Theological Studies and an Anglican Studies Diploma. I have foundational knowledge in testing, education, and in the canonical areas. In 30 years working full-time in higher education, I have developed, written, and edited countless assessments, including questions and rubrics. As a reader for the Advanced Placement Psychology exam, I have used rubrics to grade thousands of essays in a concentrated period of time. I am an experienced educational technologist who enjoys working online using a variety of tools. I have worked as a member of a number of teams in a variety of settings and have great appreciation for the power of collaboration to bring out the best in each of us. I believe that these experiences and skills equip me uniquely to serve on the General Board of Examining Chaplains, and it would be an honor to serve in this way.

Peter Williams

Lay
Asheville, NC
Grace EC, Asheville, NC
Western North Carolina, IV



I held Board membership from 2000 to 2012, then again from 2015 to 2018, filling a vacancy. Since then I have served as a member of the History committee, for which I was the primary author of a number of questions over the past two decades. I received the Ph.D. from Yale in 1970 in Religious Studies with emphases in the History of Christianity and American Religious History. From 1970 to 2012 I taught in the Department of Comparative Religion at Miami University in Oxford, Ohio, and also held visiting appointments at Bexley Hall, Bowdoin College, and Stanford University. Relevant professional work includes having served as editor of the 9-volume Studies in Anglican History, sponsored by the Historical Society of the EC; as author of the book Religion, Art, and Money: Episcopalians and American Culture from the Civil War to the Great Depression (UNC Press, 2015); and a number of reviews in Anglican and Episcopal History and other scholarly journals on Anglican/Episcopal themes.

Thomas Williams

Priest

Tampa, FL

Cathedral Church of St Peter, St Petersburg

Southwest Florida, IV



As a philosophy professor since 1994, I have considerable experience in developing tests, evaluating answers, and assessing the success of an exam in measuring what it is intended to measure. Having taken the GOE myself (in 2008), served as a reader (in 2009, 2010, and 2012), and carefully watched the development of the GOE in the years since, I am keenly aware of the high stakes of the exam, the crucial importance of pastoral sensitivity in evaluating responses, and what makes for good questions. My academic training and publication record show my expertise in church history, theology, and ethics; I also have considerable practical experience and continuing education in church music and liturgy. Having now had one foot in both academic life and priestly ministry (as both a professor and a cathedral canon), I am well-positioned to offer what I think would be a useful perspective on the General Board of Examining Chaplains.

Andrew Wright

Priest

Newark, NJ

Newark, II



I have a deep love for the Church, for the laity and the clergy, and our mission of reconciliation that we seek to undertake in the world. The Church is part of God's saving work, that continues day by day in and through each of us. My skills include an ability to read and reflect carefully, connecting current concerns with our tradition of scripture and theology. I'm also trained academically with a doctorate in liturgical theology and have a great concern for formation at all levels of education, desiring to help shape clergy and lay leaders through teaching and conversation. I have had opportunities to work in a wide variety of positions, dioceses, and contexts, giving me a broad perspective of the church's ministry. I've served as rector, as associate and as interim; I've taught high school theology and seminary liturgics; I've served in youth, college, and school ministries. I now serve on a diocesan level as Canon to the Ordinary. This breadth informs my perspective on ministry.

TRUSTEES OF THE GENERAL THEOLOGICAL SEMINARY

TERM OF OFFICE:

3 years

NUMBER TO BE ELECTED:

2 lay persons by the House of Deputies

2 presbyters or deacons by the House of Deputies

2 bishops by the House of Bishops

POSITION DESCRIPTION:

Trustees are responsible for evaluation, planning, implementation, and financial oversight of the Seminary for the fulfilling of its mission: “to educate and form leaders for the church in a changing world.” Specific duties include constituting professorships, electing the Dean and members of the faculty, prescribing the course of study, and establishing rules and regulations for the government of the Seminary.

QUALITIES & COMPETENCIES OF A TRUSTEE OF GENERAL:

- supportive of the Mission of General, committed to the three foci of Sustainability, and willingness to work towards advancing the Four Strategic Pillars, exercising a fiduciary level of trust, care, loyalty and obedience to the mission of General
- actually and actively committed to General’s long term success
- bringing knowledge and experience in one or more of the substantive areas of present need: investment management, insurance, fundraising/capital campaigns, hotel/conference management/food and beverage operations, construction/architecture, higher education, entrepreneurial ventures, and IT
- keenly concerned and engaged in developing strategies to meet the future needs for lay and ordained leadership in the church through a stronger General
- committed to working effectively and collegially with fellow Trustees, the Dean/President and other key faculty and administrative leaders of General
- aware and supportive of the duties and proper focus of trusteeship
- willingness to actively engage in committee work
- get from others or give to the Annual Fund at least \$5000 per fiscal year
- meaningfully participate in an upcoming Capital Funds Campaign
- encourage your diocesan and other Bishops and Commissions on Ministry to send students to General - host, co-host, or assist with a Friends and Alumni Gathering in your diocese

FIDUCIARY OBLIGATIONS:

- to always exercise the duty of care in carrying out the Trustee's actions
- to always act with loyalty to General; this requires each Trustee to act without any conflicting interest and to carry out the duties as a Trustee of General for the sole benefit of General, without regard to benefits or burdens on any other institution, including the other body from which one is elected or in which one participates or has an interest

Michael Braxton

Lay
Pittsburgh, PA
Calvary Episcopal Church, Pittsburgh, PA
Pittsburgh, III



I am honored to be a current trustee of GTS. I have learned what a close-knit Christian community GTS is and have been welcomed home, as the seminary invites all of us. Spreading the message of home and welcome is the basis of GTS's continued success in a sound and hopeful future. I bring to this position nearly 20 years of fundraising and development experience in higher education and in the non-profit sector. I am the Director of Development for Pittsburgh Opera and before that led a team of fundraisers at Carnegie Mellon University. I am also trained as a lawyer and commercial litigator. It is a varied background of experience that I continue to offer in service to my church community. I am active in my parish and have held various leadership roles in my diocese, including chairing our Bishop Nominating Committee. At this Convention, I serve on PB&F and previously on the Committee on Ministry. I ask for your continued prayer and hope for your support again.

Kevin Brown

Bishop
Wilmington, DE
The Episcopal Church in Delaware
Delaware, III



I am proud to have been nominated to consider this wonderful work, and I would be very happy to serve if elected. My experience is diverse, as my resume reveals, but more, my confidence in the loving power of Jesus Christ to transform the world has never been stronger. I am convinced that the body of Christ-the church-is called to do great things in Christ's name, and I rejoice in being a part of it. We live in a moment of great challenge and great opportunity. May we have the grace and courage to embrace them!

Noreen Duncan

Lay
Trenton, NJ
Trinity Princeton
New Jersey, II



I sense that the General Theological Seminary is poised to play a pivotal role in this climate of international soul searching. I want to be part of that walk to the promise with the GTS. I want to help grow the GTS tradition of nurturing the faithful who dream dreams. In May, the Holy Spirit led several of us in the NJ Episcopal Diocese to create the first virtual Anti-racism training course in The Episcopal Church. Two more courses have been scheduled. Opening sacred space to access information is integral to Anti-racism training. I believe that the GTS would embrace this kind of innovative leadership. I am the president of the Trinity Cathedral Academy Board. A retired Distinguished Professor of English, I had been department chair, a class-room and distance learning instructor for 37 years. Teaching and creating curricular innovations, I advised student associations, editing two (2) literary journals and designing a multi-discipline Pan African faculty lecture series.

Deon Johnson

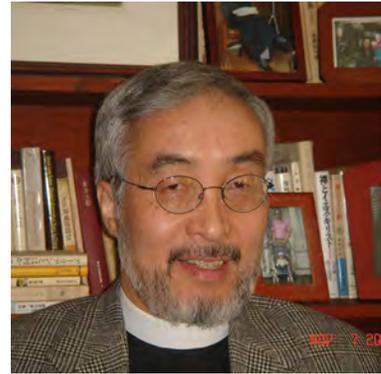
Bishop
St. Louis, MO
Missouri, V



"A single bracelet does not jingle." I have often used this Congolese proverb as a reminder we were made for community, connection, and collaboration. I currently serve as the Bishop of the Diocese of Missouri and previous to that the Rector of a parish in the Diocese of Michigan. As a bishop and parish priest I am at my best when working with others to affect change. The Episcopal Church is in the midst of transformation. Change always involves naming and grieving what has been, while dreaming and daring about what could be. I hope that my experience in bringing others together could be used both as a Trustee of General Theological Seminary an on the Joint Nominating Committee for the Election of the Presiding Bishop. In this season of naming, grieving, dreaming and daring it would be an honor to serve the wider church as we envision the next normal to which God is call us as form a more Beloved Community.

T. James Kodera

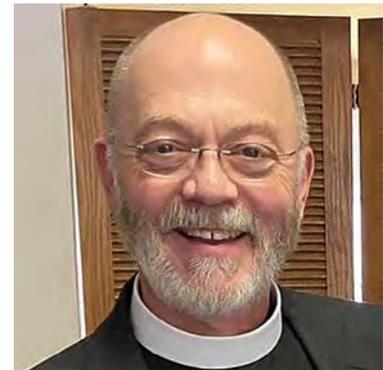
Priest
Sudbury, Massachusetts
St. Luke's Episcopal Church, Hudson, MA
Massachusetts, I



I would like to continue contributing to the Board of Trustees of the General Theological Seminary my experience in two vocations: academic and church. I offer more 40 years of teaching Religion as an academic field at Wellesley College, and 3 years before that at Oberlin College. My teaching and research in the comparative and historical study of religion will give a broad perspective on Christian theological education. The other is my experience as the first Asian American priest, ordained in the Diocese of Massachusetts, one of the charter dioceses of our Church. Since I was ordained in 1985, I have served several parishes; the last 20 years as part-time Rector at a working-class parish west of Boston. I also served in the Episcopal Asiamerica Ministry (EAM), including as President of the EAM Council. In addition, I also bring global experience and perspective. I was born and bred in Japan, where Christians still comprise one percent of the population.

Richard Norman Jr.

Priest
Parrish, FL
Southwest Florida, IV



I have blessed with many different leadership roles, within the Church and the greater community-I have proved my ability to lead. My leadership model is transparent, collaborative, distributive, and innovative. I possess the ability to align the gifts and passions of individuals and faith communities and elected bodies with the needs of the Church and the world. I am a compassionate, energetic. I possess knowledge of finances and systems. I enjoy collegial relationships and thrive as a member of team. I have a passion and love for General Seminary; I was formed on the Close and General provided me the springboard to experience my past and present ministry contexts. I believe my gifts and passions will benefit the Board as they lean into the future of the Seminary and the Church.

JOINT NOMINATING COMMITTEE FOR THE ELECTION OF THE PRESIDING BISHOP

TERM OF OFFICE:

3 years + (some work required following the election)

NUMBER TO BE ELECTED:

Five (5) lay persons and five (5) clergy persons, one of whom must be a deacon, elected by the House of Deputies; Five (5) bishops elected by the House of Bishops. Total persons to be elected: 15

Total persons on the committee: 20 (2 youth reps. to be appointed, 3 other members to be appointed to ensure diversity)

POSITION DESCRIPTION:

The Nominating Committee shall:

- design a process to solicit and identify qualified nominees for the office of the Presiding Bishop;
- inform the wider Church of the process and timeline
- prepare and publish a profile for the election of the next Presiding Bishop;
- select a slate of not fewer than three (3) members of the House of Bishops;
- establish a petition process for additional nominees;
- provide for pastoral care for the nominees, their families, and their diocesan staffs;
- present to a Joint Session of the House of Deputies and House of Bishops the names of the nominees to be considered by the two (2) Houses; and
- report its actions, expenditures, challenges, and recommendations to Executive Council within three (3) months after the election.

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE:

Members of the Joint Nominating Committee for the Election of a Presiding Bishop should have the ability to listen well, in order to hear from a wide representation of the church what gifts, abilities, and characteristics it discerns it needs in the next presiding bishop, and to hear from nominees what they discern about the direction of their own ministries. They should also have the ability to consolidate and clearly communicate the resulting vision to the wider church.

Members should have some understanding of the roles and responsibilities of the presiding bishop and the scope of the work. Committee members must understand that they are nominating candidates for the whole church and not leverage their role in the nominations process or their proximity to the candidates to advance personal agendas.

It would be helpful if the following skills and experience were represented among the membership, though not every member need have them: logistics, event planning, project management, pastoral care, human resources management, interviewing, public relations/communications/ journalism, and data collection or survey design.

It is helpful to have familiarity with conference call technology such as Adobe Connect or Zoom. It is vital that nominees have computer literacy and internet access. Committee members must have the ability to keep information confidential.

Thomas Alexander

Lay
Little Rock, AR
Christ Episcopal Church
Arkansas, VII



Having worked closely with the Presiding Bishop over the past several years, especially through the challenges of the pandemic, I feel called to offer my name and experience to the Church in this season of discernment. I've been a member of the Executive Council since 2015, serving on the Joint Standing Committees on Governance/Operations and Local Mission and Ministry, and chairing the Working Groups on Alcohol and Substance Abuse and on Executive Council History and Racial Reconciliation. I've been a member of the Standing Commission on Liturgy and Music since 2015, serving on the Subcommittees on the Church Calendar and the Revision of the BCP, and co-chairing the Subcommittee on Formation. I'm a three-time deputy to the General Convention, serving as a member and then Vice Chair of the Legislative Committee on Prayer Book, Liturgy, and Music. As an organist, I've served in Arkansas and Western North Carolina. This fall, I'll begin at Virginia Seminary as a postulant from Arkansas.

Jennifer Baskerville-Burrows

Bishop
Indianapolis, IN
Indianapolis, V



As a parish priest, leader at the church-wide level, and now bishop, I've seen the varied ways the office of PB has been inhabited. Our church, like the world, is at an inflection point. I believe those called to be PB must be further persuaded by this particular call to the church's mission of reconciliation in Christ. In seeking to build a slate of nominees I would bring the gifts of bridge-building, collaboration, and adaptive and strategic thinking. For over 30 years I've been helping others discern their gifts for ministry. When I served on CREDO faculty leading the section on "discernment" I would remind participants that discernment is an ongoing, never ending listening to our lives that we do alone with God and in community with others. It is not about making "good choices" but about hearing and seeing well. The Holy Spirit is alive and well in the church and the world and it would be my joy to hear and see what the Spirit is up to as we make this important call.

Kevin S. Brown

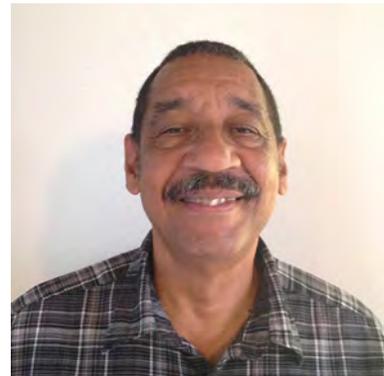
Bishop
Wilmington, DE
The Episcopal Church in Delaware
Delaware, III



I am proud to have been nominated to consider this wonderful work, and I would be very happy to serve if elected. My experience is diverse, as my resume reveals, but more, my confidence in the loving power of Jesus Christ to transform the world has never been stronger. I am convinced that the body of Christ-the church-is called to do great things in Christ's name, and I rejoice in being a part of it. We live in a moment of great challenge and great opportunity. May we have the grace and courage to embrace them!

Louis W. Glosson

Lay
San Jacinto, CA
Church of the Good Shepherd Hemet, CA
San Diego, VIII



Over the past several years I have served on two nominating bodies: Office of Black Ministries of the Episcopal Church and Search Committee for Bishop of the Diocese of San Diego. Currently, I serve as a Senior Warden at the Church of the Good Shepherd, member of diocesan Standing Committee and on the Bishop's Advisory Council. In 2022 I will complete a term on Executive Council where I have served on the GAO Committee. A longtime member of the Union of Black Episcopalians, I have served as Youth Advisor and mentor. By serving in these various positions I have gained valuable experience and knowledge about the Episcopal Church and the duties of the Presiding Bishop. My past professional experience in EEO provided a background in HR, public relations, and communications. These experiences allow me to contribute my skills and gifts to the Nominating Committee.

Maureen-Elizabeth Hagen

Deacon
Portland, OR
St. Stephen Episcopal Parish, Portland
Oregon, VIII



I take time to discern. I try to rid myself of preconceptions, and have a spirit of curiosity and wonder. I have a deep abiding love of God and God's people. I listen to many disparate voices, asking others about their dreams. I have done a lot of spiritual direction and one-on-ones. They have served me well. I have found when given the opportunity to participate, people engage. I am strategic, tending to see the overall picture rather easily. That helps for planning, introducing change, planning events. I have put on many conferences for up to 300 people. I can focus on the details, including budgets.

Coming to the church at 41, I appreciate its great gift and practice radical hospitality. I have had a broad exposure to TEC through my work with deacons, Forma, General Convention, Baptized for Life, Nuevo Amanecer, UBE, and theological education. I adapt well - I moved our entire diocesan school online in 3 days. Although I work well independently, I am collaborative.

Deborah Harmon Hines, PhD

Lay
Memphis, TN
West Tennessee, IV



I love God, family, and the transforming nature of learning. In loving God, I love the Episcopal Church. The Episcopal Church has been part of my family since I was confirmed at age sixteen. It would be my honor to serve this Church as a member of the Joint Nominating Committee for the Election of the Presiding Bishop.

Professionally, I have served on several high-level search committees. I have a long track record of service to the Episcopal Church. I know the Episcopal Church broadly after serving as National President of UBE (1982-88), Church Pension Fund Trustee (2000-2012), Trustee of the Diocese of Western MA (2005-2015), Vestry of Holy Spirit Episcopal Church (2015-2000), and Deputy to General Convention from WMA (1991 - 2012). I bring my analytical and administration skills honed as Vice Provost at the University of Massachusetts Medical School and my pedagogy skills Professor of Radiology, Nursing and Cell Biology. I am married to Rev. John Edgar Freeman.

Toni C. Hogg

Lay
Hayes, VA
Abingdon, White Marsh, Gloucester, VA 23183 &
St. Aidan's, Virginia Beach, VA 23452
Southern Virginia, III



I have been privileged to serve on numerous committees and boards in the wider church. I have been a lay deputy to General Convention since 2006. I have served on the Presiding Bishop's Confirmation Committee (Bishop Curry was elected), Ministry Committee and presently serve on the Joint Standing Committee on Nominations. I believe that my experience, acquired insight and skills are well-suited to the continuing challenges of General Convention and the committee work. I have been blessed to witness and learn from so many others in the church, and this has left me well-versed in discernment, listening and dialogue skills which impart to me an inclusive perspective of The Episcopal Church.

Michael Hunn

Bishop
Corrales, NM
Rio Grande, VII



As Canon to the Ordinary for Bishop Michael Curry and his chaplain at the General Convention that elected him Presiding Bishop I experienced the election and transition of one PB to another first hand. As Transition Minister for the Diocese of the North Carolina for over 12 years I learned much about what makes for healthy transitions in the church. As a participant in Presiding Bishop Curry's installation and transition to the work of Presiding Bishop I understand the critical ministry of the church-wide staff, the work of Executive Council and the inner workings of the Church Center. I am committed to a smooth, welcoming and empowering transition for the next Presiding Bishop of the Episcopal Church.

Deborah M. Jackson

Priest

Hixson, TN

St. Paul's Episcopal Church (Chattanooga, TN)

Florida, IV



Prior to becoming a priest, I had a career in marketing and management in the insurance industry, during which I acquired many skills that inform and amplify my ordained ministry. I currently serve as an associate dean at the School of Theology at Sewanee, a position I began after six years as a parish priest. My work now focuses on formation of church leaders, especially planning orientation for new seminarians and supporting their overall experience. I provide pastoral care, and collaborate with others as needed to ensure an environment of seamless care for the students. I have also enjoyed serving the wider church as the National Chaplain for the Junior Daughters of the King, and as a delegate of TEC to the United Nations Commission on the Status of Women. I have experience in event planning and project management, and I have served on numerous executive search committees. If elected, it would be my honor to serve on this committee, and with God's help, to contribute to the mission of the Church in the world.

Dixie Roberts Junk

Priest

Westwood, KS

St. Paul's Episcopal Church &

Iglesia Episcopal de San Pablo; Kansas City, KS

Kansas, VII



Ministering in a bi-lingual, multi-cultural urban context & working with the Office of Latino/Hispanic Ministries has given me training & practical experience affirming cultural competency, listening, & advocating for diverse voices. I hope to use my experience to foster a committee that respects all voices & perspectives of TEC. In my work & serving on non-profit boards I have focused on leadership development. I welcome an opportunity to share the potential of adaptive, creative, engaged leadership to energize the committee process. I've had a versatile career & worn many hats: As an architect I coordinated teams of diverse individuals to design, develop & construct projects. Being a business owner required creative problem solving & adaptability. I've needed to be resourceful, innovative & technically savvy as a parish priest to remain relevant in a changing world. This variety allows me to be adaptive and serve the committee where most needed.

Lydia Bucklin

Priest

Marquette, Michigan

Northern Michigan, V



At the heart of my vocation is deep listening and honoring the voices of local communities. As I travel across the Upper Peninsula of Michigan, ministering alongside small, yet deeply committed and gifted communities of faith, I hear that now, more than ever, we long for genuine connection, with one another, the broader church, and especially with God.

In learning to live out my vocation I've developed skills in community organizing, creating processes and spaces to listen for collective discernment and the Holy Spirit. I am passionate about small churches/dioceses, children and youth ministry, dismantling racism, evangelism, and re-imagining theological formation for all. My skills and experience also include transitions ministry, communications (including design, editing, and publishing), and ministry development (recognizing and cultivating the potential in others). If elected to this committee, I will work tirelessly to ensure the integrity of the search process.

Mark Lattime

Bishop

Fairbanks, AK

Alaska, VIII



Having served 10 years in the Diocese of Alaska, I have come to appreciate most my ability to listen deeply to others. Not all people communicate in the same way the dominant/Western culture expects. I have learned that it is crucial to listen as much with the eyes as with the ears; to be present to what is being said, but to attend as well to what is being left unsaid. There is a skill to both emotional intelligence and cultural awareness. Living in and serving among the diverse communities of Alaska has help me to hone these skills. I've also come to appreciate how so many of the important and worthy discussions and ministries that the Episcopal Church invests resources of time, energy, and money in are lost on small remote communities that are led by lay leaders and where infrastructure limitations make participation impossible. As we consider candidates for the next Presiding Bishop, it will be important that the interests and hope of the whole church is heard.

Janet MacNally

Deacon

Minneapolis, Minnesota

St. Paul's Lake of the Isles

Minnesota, VI



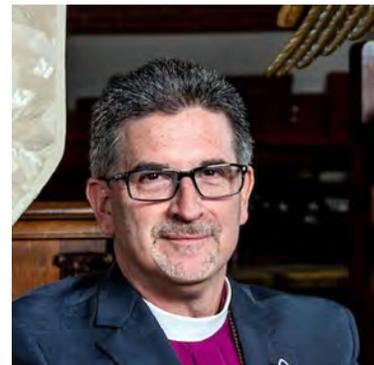
My secular career was as a teacher and coach for Speech and Theatre Arts. As such I have developed and enhanced the skills of listening as an important partner in any communication endeavor as well as the ability to communicate in both written and spoken word with clear and concise messaging. I can speak in person, on Zoom or on tape. As we continue to find our way in the 21st Century with everything that has come our way from a global pandemic to the urgency to face and change the long standing systematic racism that has plagued our nation for the past two hundred and forty four years the church finds herself in a unique place to provide a significant and spiritual voice at the table. It will be important, at this juncture, to hear the voices of all her faith communities, from the largest of cities, to the Native American missions, to the suburbs, each with a different and yet equal vision as to what the church should be in this place in time. Also, like all of us, I can Zoom.

Jose McLoughlin

Bishop

Asheville, NC

Western North Carolina, IV



José Antonio McLoughlin is the seventh bishop, and first Hispanic, of the Episcopal Diocese of Western North Carolina. Prior to his election as bishop, José has served in the dioceses of Oklahoma, Southeast Florida, and Virginia. José is a hands-on bishop, dedicated to the people of the diocese and the clergy who serve them. He has committed to being fully engaged in the church's ministry with youth, minorities, and underserved populations, and is passionate about raising up a new kind of leadership food the church in our day. While not disregarding the great traditions of the Church, Bishop José believes that changes are necessary in the ways the church ministers in our day, and many of those changes must originate from the ministry of the bishop. Born in San Juan, Puerto Rico, Bishop José is bilingual, enjoys music, playing the drums, all things aviation and studying 18th century American history.

Tracie Middleton

Deacon
Fort Worth, TX
Trinity, Fort Worth
Fort Worth, VII



This committee's responsibilities include collecting input from across the church to build a profile of the who we'll be looking for in our next presiding bishop. I have experience in designing surveys, aggregating data, and visualizing results. Most of my work experience has been in journalism and communications. I'm good at distilling large amounts of information. I've participated in nominations processes in my diocese, at the Association for Episcopal Deacons, and on the Joint Standing Committee for Nominations. I've enjoyed creating administrative and tracking tools and tapping into the (usually fewer than) "six degrees of separation" among every member of the church to connect with potential candidates. There are also occasional deeply reflective conversations about discernment. This committee is also tasked with providing for the pastoral care of nominees, their families, and staffs. I feel strongly about designing each step with pastoral care in mind.

Steven Nishibayashi

Lay
Glendale, CA
St. Mary's (Mariposa)
Los Angeles, VIII



As a member of Executive Council since 2015, I have experienced the complex governmental structure of the Episcopal Church and the importance of having a wise, visionary leader in the Presiding Bishop. I have nearly 50 years of service in the Diocese of Los Angeles and the broader church. Through my work on the Standing Committee, Commission on Ministry, and as Chair of the Bishop Coadjutor Search Committee (1999) in the Diocese of Los Angeles, I have learned the vital importance of developing the trust of potential candidates by respecting the confidentiality and integrity of any discernment process, especially for nomination for Presiding Bishop. I believe I bring the skills and experience necessary for this process of discernment.

Thomas W. Peters

Priest
Cheshire, CT
Christ Church, Bethlehem
Connecticut, I



I have served on 3 nominating committees seeking candidates to lead organizations, from head of school in a secular world, to parish rector and diocesan bishop in a religious world. For each, I brought an appreciation for the historical significance of the institution as well as an appreciation for the need to respond to new and changing dynamics. In each search, a "first" was achieved: first female head of the school, first female rector and one who supported gay rights, and first bishop from outside the diocese. Subsequent experience as a deputy to General Convention 2015 and on the Task Force on Provinces gave me greater appreciation for the work of TEC. Today I work in a bi-vocational capacity, the leader of a small church seeking to redefine itself in an increasingly secular world and a classroom teacher in a secular school seeking to find a sense of spiritual direction and meaning. I would love to bring this balance and experience to the search for a new leader for TEC.

Richard Pryor III

Lay
Kent, OH
Christ Church, Kent
Ohio, V



As a recent graduate of the University of the South, I was able to serve in a number of leadership roles in All Saints' Chapel and elsewhere. Throughout those four years, I was able to meet a variety of students, faculty, and guests, giving me exposure to the church and those in it that would have been impossible anywhere else. I have augmented those experiences with serving at three General Conventions, doing mission work in the broader Anglican Communion, serving as an editor of the new magazine Earth & Altar, and serving on my diocesan task force for young adult ministry. These experiences have taught me three things - first, what an asset Bishop Curry is to this church; second, what a great task his successor will face; and third, what a wide range of opinions there are in this church. I will bring a skill at listening to others, a style of decision-making bathed in prayer and discussion, and a joy in working hand-in-hand with God and other people.

Phoebe Roaf

Bishop
Memphis, TN
West Tennessee, IV



I would welcome the opportunity to serve on the Joint Nominating Committee for the Election of a Presiding Bishop. Before ordination I was a public policy analyst and a business attorney. In both vocations I collaborated with others to identify mutually beneficial solutions for the parties involved. This entailed researching pertinent issues, formulating questions, engaging in active listening, resolving conflict, analyzing and synthesizing information, and presenting the findings before groups of various sizes. Nothing is wasted in God's economy as these skills have been an integral part of my current vocation. I would prayerfully approach the work of the Joint Nominating Committee with an open heart and mind.

Bill Robison

Lay
Wauwatosa, WI
Trinity EC, Wauwatosa WI
Milwaukee, IV



In my roles as a parent, business owner, volunteer and member of the Episcopal Church, I have sought to identify strengths and skills in those around me, to recognize and nurture those gifts, and encourage others to realize their impact on others. Since my first service as deputy in Anaheim 2009, I have been involved in a number of bodies where I discerned the potential usefulness of my own gifts. Among others, I served on the House of Deputies Committee on Confirmation of the Presiding Bishop, and the Task Force on Review of Presiding Bishop Election and Transition Process, studying the work from nomination through consecration and transition, and its effects on the candidates, their families, home dioceses, and the church. I also served on the Nominating Committee for the 12th Bishop of my own diocese. All this has taught me much about the honesty, confidentiality, humility and effort required as central to the charge of this committee. I feel called to offer my gifts to this work.

Audrey C. Scanlan

Bishop

Mechanicsburg, PA

Central Pennsylvania, III



I came to work in the church with a varied set of experiences that included working as an Executive Chef, schoolteacher, in the Guidance Department of an Elementary School, and as founder of two non-profits serving emotionally needy children. I honed my gifts of organization and administration as an entrepreneur and as a manager offering supervision and oversight that is essential in transforming a vision to a sustainable enterprise.

I possess clarity of thought and a visual learning style that perceives organizational structure as strength. The work of this committee will need to be able to see clearly the current gifts and challenges of our church and identify places in our structural system of strength, need, and openness to change. Determining priorities and creating plans to accomplish goals while allowing for organic shifts is essential. I believe that I am competent in leading with these ideas in mind.

I also am a published writer and appreciate good communication.

Mary Frances Schjonberg

Priest

Bradley Beach, NJ

Newark, II



During the nearly 14 years I worked for the Episcopal News Service, I often traveled with the presiding bishop across The Episcopal Church and the Anglican Communion. I saw how each one reacted to the demands of the job. I saw the work of the presiding bishop evolve, within the bounds of the Constitution and Canons, to meet the challenges facing the church and the world. I also experienced how those changes impacted the churchwide staff. Each of the three presiding bishops for whom I worked had a different style, so I witnessed both the flexibility and rigidity of the bounds of the office. My work also allowed me to get acquainted with many members of the House of Bishops and learn about how they are managing change in their dioceses. I feel called to offer my knowledge and experience of the breadth and depth of the church, and my communications skills, to the work of discerning and nominating a slate of bishops from which General Convention will choose our 28th presiding

Rose H. Sconiers

Lay
Buffalo, NY
St. Philip's
Western New York, II



As a retired Judge, having served in City Court, Supreme Court and Appellate Court, I have acquired the necessary skills to be objective by listening to facts and making decisions that affect the lives of individuals, families and communities. I have also served in several leadership positions in the church, the courts and the community. I will utilize my life learned skills and God given gifts of compassion and humility to serve the Nominating Committee for the election of a new Presiding Bishop.

Anne Swardson

Lay
Paris, France
Cathedral of the Holy Trinity, Paris
Convocation of Episcopal Churches in Europe, II



As a Christian, I have learned the power of the Word. As a journalist for four decades, I have learned the power of words. As a lay member of numerous Cathedral and Convocation bodies, including as president of the Council of Advice, I have learned how important it is not just to write and speak, but to listen and understand. I have participated in two canon searches, one dean search and one bishop search. In a practical sense, this means I can write press releases and other communications that convey the work of the Nominating Committee, I can help prepare a profile for what we seek and otherwise ensure that all written communications do the job we intend. Because the Convocation is spread across seven countries, I am very experienced with managing and acting via video conference. As one of the chief organizers of the April 2019 consecration in Paris of our bishop, Mark Edington, I'm also skilled in making things happen, in an organized, punctual and calm way.

Brian Thom

Bishop
Boise, Idaho
Idaho, VIII



I have served my entire ordained ministry in the Intermountain West. As priest and bishop, I have happily ministered for the last twenty-nine years in the Diocese of Idaho. This experience has left me with a particular appreciation for the character of life in rural, western states. The breadth of the Episcopal Church was opened up to me through participation in each General Convention since 1994. I served several triennia on the Standing Committee on Ministry and for the last two Conventions on the Special Committee on Marriage. For this triennium, I am participating in the work of the Task Force on Liturgy and Prayer Book Revision. The fruition of these many experiences will help me serve the Joint Nominating Committee for Election of the Presiding Bishop well. I will bring an important perspective from a smaller and more dispersed portion of the Church, providing a more complete picture of the Episcopal Church our next Presiding Bishop will serve.

Margaret Thor

Deacon
Arden Hills, MN
St. John in the Wilderness, White Bear Lake, MN
Minnesota, VI



Several words come to mind when describing my competencies and skills that are important in serving on the nominating team including leadership, teamwork, responsible, decisive, listener, good interviewer, and organized. I spent the majority of my 32-year career at the IRS as a manager and senior manager leading groups of individuals in accomplishing a specific plan and meeting deadlines. In both leading people and working on teams, I listened carefully to those I worked with to ensure they were heard and their ideas incorporated to achieve our mission. I employed these skills on the search team for the X Bishop of Minnesota. I was the lead of the planning team for the discernment retreat which involved overall organization of the event, interviewing and listening skills, timeliness, and decision making. I am a deacon fulfilling my call to serve God in the world. I use my skills to bring people together demonstrating God's love at homeless shelters, feeding ministries, and advocacy.

Megan M. Traquair

Bishop
Sacramento, CA
Northern California, VIII



The search for nominees for Presiding Bishop is so vital, that it must be both effective and Spirit-filled. My skill in forming teams, focused on their mission while retaining their pastoral nature, has been a critical and positive addition to the committees I serve. I have a strong ability to listen, elicit information, and organize these learnings. I believe in and have guided smooth clergy transition processes from many angles. I have a good eye for the workings of large systems and an interest in how it all feels at the ground level. The quality of the search team interaction will affect the experience of the rest of the church. There are many stakeholders in this journey and a clear path, regular communication, and much prayer is needed. It will shape how The Episcopal Church can participate and be heard. My competency in these areas can assist the Joint Nomination Committee in both wise action and the quality of its communal life during a very important time of holy discern

Kate E. Wesch

Priest
Essex, CT
St. John's Episcopal
Connecticut, I



This is the church that has raised, formed, and empowered me to be the leader that I am today. I have spent time in all corners of the church from Oklahoma, to Seattle, to Connecticut. I have worshipped in Episcopal communities of all shapes and sizes; rural to urban, rich to poor, young and old, and always among people with a deep and abiding hunger for Jesus and eager to share the good news of God in Christ. As a priest, I have primarily served two congregations: one an urban, rapidly growing, and well-resourced congregation and the other a scrappy and growing congregation with a giant heart. I believe fervently that it is possible for congregations of all sizes and contexts to develop into more faithful, healthy, and effective communities that seek to be transformed and bring about the kingdom of God. What I bring to this committee is a lifetime of love for this church, hope and vision for its future, and the courage to dream something new.

Robert C. Wright

Bishop

Atlanta, GA

Atlanta, IV



I bring over thirty years of studying, practicing and inspiring leadership in complex organizations. I have learned much as as a board member and member of search committees for Deans and Heads of Seminaries, Episcopal Schools and Independent schools. With members of the Diocese of Atlanta, I have developed right- sized search processes for congregations and created and implemented a diocesan wide leadership training for clergy, laity and young people for the eighth largest diocese in the Episcopal Church. Through these experiences, I have deepened my ability to listen and discern direction with people with multiple interpretations and have increased my capacity to create catalytic questions helping groups move from inquiry to impact. I relish the opportunity to offer my experience and enthusiasm for the Lord of the Church at this inflection point in our common life.

JOINT STANDING COMMITTEE ON PLANNING AND ARRANGEMENTS

Membership

The Rev. Canon Dr. Michael Barlowe, <i>Chair</i>	California, VIII	2021
The Rev. Devon Anderson	Minnesota, VI	2021
Mr. N. Kurt Barnes	New York, II	2021
The Rt. Rev. Diane M. Jardine Bruce	Los Angeles, VIII	2021
The Most Rev. Michael Curry	North Carolina, IV	2021
The Rt. Rev. Wendell Gibbs	Michigan, V	2021
The Rt. Rev. Mary Gray-Reeves	North Carolina, IV	2021
The Rev. Gay Clark Jennings	Ohio, V	2021
Mr. Bryan Krislock	Olympia, VIII	2021
Mr. Ryan Kusumoto	Hawaii, VIII	2021
Ms. Karen Patterson	Southwest Florida, IV	2021
The Hon. Byron Rushing	Massachusetts, I	2021
The Rev. Canon Scott Slater	Maryland, III	2021
The Rt. Rev. Eugene Sutton	Maryland, III	2021
Ms. Patricia Wellnitz	Nebraska, VI	2021

Mandate

JOINT RULES VI. 16

(a) There shall be a Joint Standing Committee on Planning and Arrangements for the General Convention, which shall have responsibility between Conventions for the matters indicated by its title. The Committee shall be composed, ex officio, of the Executive Officer of the General Convention, the Vice-Presidents, Secretaries, and Chairs of the Committee on the Dispatch of Business of the two Houses, the Treasurer of the General Convention, the President and First Vice-President of the Episcopal Church Women, the General Convention Manager and one Presbyter or Deacon and one Lay Person appointed by the President of the House of Deputies. In the case of a General Convention for which a meeting site has been selected, the Committee shall also include the

Bishop and the General Chairman of Arrangements of the local Committee of the Dioceses in which that General Convention shall be held.

(b) It shall be the duty of the Committee to consult with the Presidents of the two Houses, the Chairs of the Joint and Standing Committees and Commissions, Boards and Agencies of the General Convention, the Executive Council, and such other representative bodies as it may deem necessary, in the study and determination, prior to any meeting of the General Convention, of the arrangements for, and the nature of, the Agenda thereof, to be recommended by it to the General Convention for such meeting.

(c) It shall be the further duty of the Committee to take such action as may be provided by Canon for the selection of sites for meetings of the General Convention.

(d) The Committee shall have an Executive Committee composed of the Presidents of the two Houses, the Chair of the Committee, the Executive Officer of the General Convention, the Treasurer of the General Convention, and the General Convention Manager.

Summary of Work

The Joint Standing Committee on Planning and Arrangements began the triennium with the usual preparations for the next General Convention, scheduled to take place in July 2021. When the pandemic hit in March 2020, the committee had to change its focus and do scenario planning, taking into account many factors, primarily the health and safety of the attendees.

Four meetings were held before March 2020. The committee held its first meeting in Baltimore, Maryland (site of the 80th General Convention) on January 30-31, 2019. At the meeting, the 79th General Convention was reviewed and potential improvements were discussed. Subcommittees were formed to work on particular aspects of convention:

- GC Children's Program
- Scheduling/Design
- Worship
- ECW Triennial and other gatherings
- Finances
- Theme
- Communications

At subsequent meetings, these subcommittees reported on their progress. A draft schedule was approved and a theme “Walking The Way of Love – The Jesus Movement” was proposed and adopted.

The Executive Committee of the Joint Standing Committee on Planning and Arrangements visited the three finalist sites for the 81st General Convention and recommended Louisville in the Diocese of Kentucky. Required approvals from the Presiding Officers of each House, the Presidents of each Province and the Executive Council were obtained. The committee received information about possible sites for the 82nd General Convention and made recommendations based on cost, location, desire of the diocese to host the event, and availability of volunteers. Finalist sites are recommended to General Convention through a resolution.

Beginning in June 2020, the committee met regularly to receive updates on government-imposed restrictions due to the pandemic, and to consider options. Factors considered were contractual obligations, financial implications and safety of participants. The committee discussed the option of a virtual convention and what that would look like. The Chair (GC Secretary Michael Barlowe) met with Baltimore city officials and reported back to the committee. The Presiding Officers convened a small group to offer scenarios. The conclusion of these discussions and investigations was to postpone the convention, and Canon Barlowe and the General Convention staff were asked to work with the Baltimore city officials to mitigate financial loss and reschedule the convention.

In November 2020, the committee met and recommended to the Presiding Officers that the 80th General Convention be rescheduled for July 7-July 14, 2022, with at least an 8 legislative day convention. Consent of the Executive Council was sought and received.

The subcommittees will be reconvened to adjust the schedule for the new dates, and other work continued after the deadline of this report.

Proposed resolutions

A001 Site for 82nd General Convention

Resolved, the House of ____ concurring, That the following sites be considered for the 82nd General Convention (2027): Phoenix, Arizona (Diocese of Arizona); Orlando, Florida (Diocese of Central Florida); Charlotte, North Carolina (Diocese of North Carolina); Pittsburgh, Pennsylvania (Diocese of Pittsburgh); and San Juan, Puerto Rico (Diocese of Puerto Rico).

A002 General Convention Daily Agenda

Resolved, the House of ____ concurring, That the 80th General Convention function through the following activities:

1. Formal legislative sessions of the two Houses;
2. Joint session for presentation of proposed budget
3. Meetings of the legislative committees of the two Houses; and
4. Open Hearings to be conducted, as needed, by all legislative committees

JOINT STANDING COMMITTEE ON PROGRAM, BUDGET AND FINANCE

Membership

The Rev. Canon Mike Ehmer, <i>Chair</i>	Northwest Texas, VII	2021
The Rt. Rev. Jeff Fisher, <i>Vice-Chair</i>	Texas, VII	2021
The Rev. Hickman Alexandre	Long Island, II	2021
The Rt. Rev. J. Scott Barker	Nebraska, VI	2021
Ms. Cynthia Benkelman	Montana, VI	2021
The Rt. Rev. Mark Bourlakas	Southwestern Virginia, III	2021
Mr. Michael Braxton	Pittsburgh, III	2021
The Rev. Karen Davis-Lawson	Long Island, II	2021
The Rev. Patty Downing	Delaware, III	2021
The Rt. Rev. Francisco Duque	Colombia, IX	2021
Mr. William Fleener, Jr	Western Michigan, V	2021
The Rev. John Floberg	North Dakota, VI	2021
Mr. Timothy Gee	El Camino Real, VIII	2021
The Rev. David Hincapie	Colombia, IX	2021
The Rt. Rev. Carlye Hughes	Newark, II	2021
Ms. Kate Huston	Oklahoma, VII	2021
Ms. Tess Judge	East Carolina, IV	2021
The Rt. Rev. W. Nicholas Knisely	Rhode Island, I	2021
Ms. Nancy Koonce	Idaho, VIII	2021
The Rev. Ivette Linares	Puerto Rico, IX	2021
Ms. Alexizendria Link	Western Massachusetts, I	2021
Mrs. Crystal Plummer	Chicago, V	2021
Mr. David Quittmeyer	Central Gulf Coast, IV	2021
The Rt. Rev. Rayford Ray	Northern Michigan, V	2021
The Rt. Rev. Gregory Rickel	Olympia, VIII	2021
The Hon. Byron Rushing	Massachusetts, I	2021
The Rt. Rev. John McKee Sloan	Alabama, IV	2021
The Rev. Canon Dr. Michael Barlowe, <i>Secretary of General Convention, Ex Officio</i>	California, VIII	
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Deputies Angel Davila, Nathan Humphrey, Mally Lloyd, and Diana Wilcox were replaced by Hickman Alexandre, Ivette Linares, Alexizendria Link, and Byron Rushing.

Acknowledgements

This committee would be lost without the tremendous assistance of Treasurer Kurt Barnes. We're also indebted to Mally Lloyd (the President of the House of Deputies Representative), Patrick Haizel (of the General Convention Office), and Nancy Caparulo (of the Finance Office), who have been extremely helpful to this body.

Mandate

JOINT RULES II.10

(a) There shall be a Joint Standing Committee on Program, Budget, and Finance, consisting of 27 persons being members of the General Convention (one Bishop, and two members of the House of Deputies, either Lay or Clerical, from each Province), who shall be appointed not later than the fifteenth day of December following each regular Meeting of the General Convention, the Bishops to be appointed by the Presiding Bishop, the Deputies by the President of the House of Deputies.

The Secretary of the General Convention and the Treasurer of the General Convention and the Chief Financial Officer of the Executive Council shall be members *ex officio*, without vote.

The Joint Standing Committee may appoint advisers, from time to time, as its funds warrant, to assist the Joint Standing Committee with its work.

(b) The Joint Standing Committee shall elect its Chair from its membership, and such other officers as needed.

The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the Budget, as well as Sections on Funding and Presentation, the size and composition of the several Sections to be determined by the Joint Standing Committee.

The Chairs of each Section shall be elected by the Joint Standing Committee; the several Sections shall elect their own Secretaries from among their own membership.

The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; provided, however, that final action on Budget shall be taken only by the full Committee, either in meeting assembled or by a vote by mail.

(c) During the interim between regular Meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose.

Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof.

In respect of the Budget for the Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by mail, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention.

With regard to the General Church Program, the Joint Standing Committee shall:

- i. Meet and consult with the Executive Council, or its Administration and Finance Committee, on adjustments to the program priorities, and on alternate income generating resources;
- ii. Receive from the Executive Council, not less than four months prior to the meeting of General Convention, the proposed General Church Program for the upcoming triennium, including a proposed detailed Budget for the year next following that of such Convention;
- iii. Meet in such places as it shall determine, sufficiently in advance of the next General Convention to expedite its work;
- iv. Conduct hearings upon such proposed Program and Budget; and
- v. Consider such proposed Program and Budget and report thereon to the next succeeding General Convention.

(d) Not later than the third day prior to the adjournment of each regular meeting of the General Convention, the Joint Standing Committee shall report to a Joint Session, pursuant to Canon, a proposed Budget for the Episcopal Church for the ensuing Convention period, subject to the approval of the said Budgets subject also to increase, reduction, or elimination of items, based on open hearings held during the General Convention and by subsequent concurrent action by the House of Deputies and the House of Bishops.

Summary of Work

Work to Date

As it has since General Convention 77, the Executive Council's Joint Standing Committee on Finance (FIN) has involved members of PB&F in its work, including budget preparations. The chair of PB&F (Deputy Ehmer) has attended every in-person and virtual meeting of that body as a non-voting member. The vice chair (Bishop Fisher) joined those meetings in October 2020. In the past, such participation permitted a more in-depth understanding of the budget specifics and enabled a smooth transition of the proposed budget from Executive Council to PB&F. We anticipate the same benefits this triennium.

Because of the COVID-19 pandemic, which resulted in large adjustments to the calendar 2020 budget, FIN was unable to present a first draft of the 2022-2024 budget at the Executive Council's October 2020 meeting. They didn't begin those budgeting efforts until after that meeting, assuming GC80 would continue as scheduled.

Although PB&F would have traditionally met in October 2020, following the Executive Council meeting, we met for the first and only time to date on November 9, 2020, via Zoom. The meeting served as a brief introduction and review of possible timelines, given the unknown dates of GC80. Three subcommittee chairs were also elected at that meeting: Deputies Fleener, Judge, and Quittmeyer. Along with the chair and vice-chair, they will divide the proposed budget into three sections, with each subcommittee honing their expertise in their own sections.

Anticipated Future Work

Following the announcement on November 20, 2020 that General Convention 80 will be postponed until the summer of 2022, PB&F can now establish a realistic timeline to accomplish our work. FIN plans to publish their draft budget in the fall of 2021, seeking input and comments from around the Church. With that input, they will then refine the draft budget as appropriate and present it the Executive Council in January 2022 for approval.

We anticipate at least one preparatory meeting of PB&F in the fall of 2021 and to receive the proposed budget for 2023-2024 from the Executive Council at a meeting in February 2022. We plan to make the proposed budget available for further comments from across the Episcopal Church that spring.

During General Convention we will conduct hearings to receive additional input and take into consideration all resolutions with budgeting requests. Our work will continue until the point we must stop to have the proposed budget translated before presenting it to a joint session of both houses, which must take place not later than the third day prior to adjournment.

STANDING COMMISSION REPORTS

[Standing Commission on Structure, Governance, Constitution and Canons](#)

[Standing Commission on World Mission](#)

[Standing Commission on Liturgy and Music](#)

[Standing Commission on Liturgy and Music Subcommittee Reports](#)

[Subcommittee for Policy & Evaluation](#)

[Subcommittee on Calendar](#)

[Subcommittee on Constitution and Canons](#)

[Subcommittee on Formation](#)

[Subcommittee on The Book of Common Prayer](#)

[Subcommittee on The Book of Occasional Services](#)

[Subcommittee on Liturgical Translation](#)

STANDING COMMISSION ON STRUCTURE, GOVERNANCE, CONSTITUTION AND CANONS

Membership

The Rev. Canon Sharon Alexander, <i>Chair</i>	West Tennessee, IV	2021
The Rt. Rev. Sean Rowe, <i>Vice-Chair</i>	Northwestern Pennsylvania, III	2024
Mr. Thomas Little, <i>Secretary</i>	Vermont, I	2024
The Rev. Dr. Adam Trambley, <i>Assistant Secretary</i>	Northwestern Pennsylvania, III	2024
The Rev. Canon Valerie Balling	New Jersey, II	2024
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2024
Canon Annette Buchanan	New Jersey, II	2021
Ms. Nancy Mahoney Cohen	El Camino Real, VIII	2021
Ms. Carmen Figueroa	Puerto Rico, IX	2024
The Rt. Rev. Wendell Gibbs	Michigan, V	2021
Mr. Michael Glass	San Joaquin, VIII	2021
Mr. Christopher Hayes	California, VIII	2024
The Rev. Richard Edward Helmer, BSG	California, VIII	2021
The Rt. Rev. William Klusmeyer	West Virginia, III	2021
Mr. Ryan Kusumoto	Hawaii, VIII	2024
The Rt. Rev. Jake Owensby	Western Louisiana, VII	2021
Mr. William Powel	Ohio, V	2024
Mr. Jamal Smith	Virgin Islands, II	2021
The Rev. Marisa Tabizon Thompson	Nebraska, VI	2024
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

During the triennium, the following changes in membership and advisers occurred.

At the beginning of the triennium, Mark Stevenson was the Presiding Bishop’s representative to the Standing Commission on Structure, Governance, Constitution and Canons (the “Commission”). In January 2019, concurrently with Mary Kostel becoming Chancellor to the President Bishop, the Presiding Bishop appointed her to replace Mr. Stevenson as his representative to the Commission.

At its organizational meeting, the Commission elected the Rev. Molly James as its Chair; the Rt. Rev. Sean Rowe as its Vice-Chair; and Tom Little and the Rev. Sharon Alexander as Secretary and Assistant Secretary, respectively. When Molly James became Deputy Executive Officer of General Convention she resigned from the Commission and was assigned as the General Convention Office staff member liaison to the Commission, in March 2019. Thereupon, Sharon Alexander was elected Commission Chair and Adam Trambley Assistant Secretary.

Luz Montes was ordained a transitional deacon in June 2020, making her ineligible to serve as a lay member of the Commission. Since that time, she has served as a consultant to the Commission.

Representation at General Convention

Pursuant to Canon I.1.2(k), Commission members Adam Trambley and Thomas A. Little, as representatives of the Commission at the General Convention, are authorized to receive non-substantive amendments to this report at the General Convention.

Mandate

Canon I.1.2.n.1

1. A Standing Commission on Structure, Governance, Constitution and Canons. It shall be the duty of the Commission to:
 - i. Review such proposed amendments to the Constitution and Canons as may be submitted to the Commission, placing each such proposed amendment in proper Constitutional or Canonical form, including all amendments necessary to effect the proposed change. For amendments not in proper form, the Standing Commission on Constitution and Canons may direct the submitting Commission to the canonical and Rules of Order requirements for amendments to the Constitution and Canons so the submitting Commission may revise its amendment to proper form. The Commission shall express its views with respect to the substance of any such proposal only to the proponent thereof; *provided, however*, that no member of the Commission shall, by reason of membership, be deemed to be disabled from expressing, before a Legislative Committee or on the floor of the General Convention, personal views with respect to the substance of any such proposed amendment.
 - ii. Conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity, and on the basis of such a review, propose to the General Convention such technical amendments to the Constitution and Canons as in the opinion of the Commission are necessary or desirable in order to achieve such consistency and clarity without altering the substance of any Constitutional and Canonical provisions; *provided, however*, that the Commission shall propose, for the consideration of the appropriate Legislative Committees of the General Convention, such amendments to the Constitution and Canons as in the opinion of the Commission are technically desirable but involve a substantive alteration of a Constitutional or Canonical provision.
 - iii. On the basis of such review, suggest to the Domestic and Foreign Missionary Society such amendments to its By-laws as in the opinion of the Commission are necessary or desirable in order to conform the same to the Constitution and Canons.
 - iv. Conduct a continuing and comprehensive review and update of the authorized “Annotated Constitution and Canons for the Government of the Protestant Episcopal Church in the United States of America otherwise known as The Episcopal Church” to reflect actions of General Convention which amend the Constitution and Canons and, in the discretion of the Commission, develop other materials which are appropriate to the purpose of the

“Annotated Constitution and Canons,” and facilitate the publication of this document and related materials. The Commission may provide or support forums to promote commentary, discussion, and understanding of the Constitution and Canons.

- v. Discharge such other duties as shall from time to time be assigned by the General Convention.
- vi. Study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, and Boards to determine the necessity for their continuance and the effectiveness of their functions and to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new Committee, Commission, Board or Agency, it shall, wherever feasible, be referred to this Standing Commission for its consideration and advice.
- vii. Conduct a continuing and comprehensive review and update of the Title IV training materials, including drafting such changes as are necessitated by changes to these Constitution and Canons, or as may be deemed appropriate to maintain such training materials in a current and effective status.

Summary of Work

Meetings

The Commission met in person twice during the triennium, both times at the Maritime Institute in Linthicum, Maryland. In addition, the Commission met via the Zoom video conference platform eight times. The Commission also organized into subcommittees that met multiple times, and the subcommittee chairs formed an active group and met regularly. The flow and continuity of the Commission’s work were impacted by the emergence of the COVID-19 pandemic. The lack of two in-person meetings made it harder for the Commission to complete its work and some work was not completed.

At its initial and subsequent meetings, the Commission received comments and took action as reflected in this report. For more detailed accounts of the Commission’s proceedings, readers are referred to the minutes of the Commission’s meetings, available prior to the General Convention at the Commission’s webpage on the General Convention website.

Specific Areas of Work

In light of the increased volume of topics coming to the Commission due to the 2015 General Convention’s consolidation of work and elimination of other standing commissions, we divided the Commission’s work into seven topic categories:

Bishops and Dioceses
Churchwide Structures

General Convention and Rules of Order
Formation
Ecumenical Concerns
Title IV
Other Canonical Changes

The Commission was unable to address other aspects of its Canonical mandate; it did not complete a comprehensive review of the Church's Committees, Commissions, Agencies, Boards and other Interim Bodies. Officers of the Commission did, however, engage in several discussions with a subcommittee of the Executive Council that was reviewing the Church's Boards and other Interim Bodies. The Commission will continue to explore ways to fulfill its mandate following the filing of this report and in a supplemental report will provide the fruits of those labors to the 80th General Convention.

The ongoing work of compiling the revision of the Annotated Constitution and Canons (White & Dykman) continues under the leadership of the White & Dykman Subcommittee. The additional time before the 80th General Convention should allow this group to complete additional needed sections. The Commission will also be looking into ways of making White & Dykman an online interactive tool in the future.

Under its mandate (Canon I.1.2.n.vii), the Commission has responsibility for oversight of Title IV training and education. The Title IV website continues to be maintained with the assistance of communications personnel in the Diocese of Utah. Materials are being updated and added in Spanish. As changes continue to be made to Title IV at subsequent General Conventions, and as more data is available about the use of the training materials, the Commission will continue to evaluate and modify the materials to meet the needs of those involved in disciplinary processes across the Church.

This report now turns to the major topic categories addressed by the Commission.

1. Bishops and Dioceses

The Commission's Subcommittee on Bishops and Dioceses looked at a number of areas dealing with how dioceses and their Episcopal leadership fit into the larger church. Some of these explorations were directed by General Convention resolution, while others arose in the course of our work – from our discussions or by request from other interim bodies. We found that the substantive conversations around some of these issues were better held by the Task Force to Assist the Office of Pastoral Development, although the Commission hopes to remain partners in that work going forward. We also found that the upheavals caused by the COVID-19 pandemic during this triennium frustrated our ability to bring some discussions to their conclusion.

The Merging of Dioceses

The Commission's 2018 Blue Book Report proposed Resolution 2018-A113, "Amend Article V, Section 4 of the Constitution," to give greater flexibility to dioceses when they choose to combine or reconfigure themselves. At the 2018 first reading of the Resolution, instead of approving it for second reading at the 80th General Convention (currently scheduled for 2022), the General Convention chose to refer the Resolution back out to the Commission for further study to provide more clarity and flexibility regarding the Constitution and Canons of newly formed dioceses. The Commission has studied the matter again and proposes a revised version of Resolution 2018-A113 for first reading at the 80th General Convention. We believe the revised approach of Resolution [A031](#) "Amend the Constitution and Canons Relating to Mergers of Dioceses" will allow dioceses more flexibility when planning mergers or the formation of new dioceses from Dioceses or portions of one or more Dioceses. The flexibility would be achieved, in part, by moving some of the Constitutional provisions into the Canons (Canon 1.10, specifically). If Canonical changes should become necessary, they can be made at a single meeting of the General Convention to facilitate the formation or combination of the Dioceses rather than requiring two General Conventions to approve a change to the Constitution.

Updating "The Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition"

Resolution 2018-A146 urged that the document guiding Episcopal transition processes be revised and updated. We referred this matter to the Task Force to Assist the Office of Pastoral Development and offered to collaborate with them.

Consents for Elections of Bishops Suffragan

The 2018 General Convention dealt with a number of resolutions concerning the ministry of bishops. Resolution 2018-A161 removed the consent process for the election of Bishops Suffragan, with the expectation that it would be re-introduced as part of a larger canonical change proposed in Resolution 2018-A156. The 2018 General Convention passed Resolution 2018-A161, but not Resolution 2018-A156, which resulted in the consent process for the election of Bishops Suffragan being entirely removed from the canons. The Commission is proposing Resolution [A032](#) "Amend Canon III.11.9.b to Correct an Oversight in a 2018 Canonical Amendment" to reinsert the consent process.

Reception of Bishops from the Anglican Communion

The Episcopal Church has received a number of bishops from other Anglican Provinces in the recent past. Our canons do not, however, lay out a clear process for this reception. The Commission has developed a working draft of possible canonical changes, but more outreach and collaboration are needed before the Commission can complete this important work.

Standing Committee Oversees Election of Bishop Suffragan

Canon III.11.1.a is not clear regarding oversight of the election of a bishop suffragan. The Commission consulted with the Task Force to Assist the Office of Pastoral Development and is deferring to the canonical changes in its Blue Book report.

Measurements of Vitality

The Commission had a number of discussions and reviewed previous work done around questions and measurements of vitality for dioceses and congregations. We are aware that questions of vitality are part of a much larger conversation that is taking place in a variety of venues, including in the work of the House of Deputies State of the Church Committee as it looks at future possibilities for the parochial and diocesan reports. We look forward to incorporating and addressing questions of congregational and diocesan vitality as the Commission continues its ongoing work.

2018-A282 Standing Committee Testimonials

The 79th General Convention adopted Resolution 2018-A282 to make it clear that under Canon III.11.3.b when Standing Committees convene to vote on whether to consent to the election of a bishop, their members need not all be convened together in the same physical space or room. The revision added a new subsection c, providing that a majority of all members of a Standing Committee must vote to consent, and that the consent form may be signed “in counterparts.” The new subsection c refers to all “testimonials required of the Standing Committee by this *Title*” (emphasis added). The Commission believes that the reference should properly be to this *Canon*. Accordingly, the Commission proposes Resolution [A039](#) "Use More Precise Language in Canon III.11.3.c as Amended by Resolution 2018-A282" to make this further revision to Canon III.11.3.c.

Questions Concerning Bishops and Dioceses for Future Triennia

This subcommittee looked at a number of important issues dealing with bishops and dioceses that were not able to be completed in this triennium, but which may be important to look at in the future.

The General Convention asked the Commission to look at 2018-A287, which sought to clarify options for a diocese upon the death, resignation, deposition, or removal of a bishop diocesan. While this matter remains important, and we discussed these questions, we do not have a recommendation at this time.

The church needs further clarity around the definitions of disabled and absent bishops as well as measurable criteria for when a bishop would fall into one of those categories. We have also found ambiguities in determining where a bishop is canonically resident.

The Commission identified mutual ministry reviews for bishops as an important best practice. However, we felt that the Task Force to Assist the Office of Pastoral Development was the proper place for this topic to be addressed, and they have taken up that work. Similarly, how the church as a whole discerns and recruits candidates for the episcopate is a question that needs further discussion,

and the Task Force to Assist the Office of Pastoral Development is the appropriate place for the next steps in that conversation.

The process for the re-admittance of the Diocese of Cuba to The Episcopal Church demonstrated the need for further clarification around how we admit dioceses from outside of The Episcopal Church. The Commission believes there is much to be learned from this experience, but we have not yet distilled that learning into concrete recommendations.

We examined the differences between area missions and missionary dioceses and believe there is value to studying this question further. As the church adjusts to new realities, updating these structures may benefit how we carry out our ministry and mission. We also looked specifically at questions regarding a future election for a new bishop of Navajoland and concluded that no changes to canons needed to be made at this time. We would, however, be very open to changes suggested by the people of Navajoland in the coming years to ensure the election process meets their needs.

2. Churchwide Structures

Provinces

The Commission received referrals of Resolutions A076, A077, A078, A079, and D042 from the 2018 General Convention, which were proposed in the 2018 Blue Book report filed by the Task Force to Study Provinces but which were not approved at General Convention. Each of these resolutions deals with a slightly different aspect of the life and work of Provinces and how they relate to the larger church. In reviewing the work of the past two General Conventions related to proposals to restructure the Provinces, the Commission agreed with some of the concerns raised by that Task Force. No consensus, however, developed in favor of the decisive reduction of the role of Provinces from that 2018 report (see the 2018 Blue Book report at pp. 916-931). Accordingly, the Commission decided not to propose additional resolutions dealing with Provinces this triennium. We do, however, continue to encourage dioceses to explore a variety of networks both inside and outside of the provincial structure.

Posting Lay Positions

Resolution 2018-D073 asked the Commission to consider the question of public posting of stipendiary positions for lay persons and report to the 80th General Convention recommendations that would provide equitable access to the application process for qualified applicants for stipendiary positions in our congregations and dioceses, and in institutions affiliated with The Episcopal Church. We offer the following recommendations:

- Form search committees for appropriate lay positions across the church;
- Utilize best practices for the job search process to maximize interest from lay people;
- Determine whether positions being considered for clergy can also be performed by lay professionals;

- Determine whether lay positions being considered are for Episcopalians only or can be filled by those not members but who are familiar with the church;
- Be intentional about diversity in job searching and post positions on platforms that support that goal;
- Ensure that these open positions are shared with Diocesan Transition Ministers;
- Be intentional also in sharing open positions with the Episcopal Communicators network;
- Disseminate job openings via the wider church network as well as diocesan and parochial media platforms. e.g., social media, email, newsletters, etc.;
- Disseminate open positions on external secular job sites; and
- Post lay positions in the Office of Transition Ministry database. The Episcopal Church’s website notes, “It’s the Office and Board for Transition Ministry’s vision that this database will capture and highlight the significant gifts and skills embodied by the clergy and laity of the Episcopal Church.”

Interim Body Minority Reports

The Commission discussed whether the canons should specify when and how a Standing Commission’s (or other interim body’s) Blue Book report may or should include a “minority report.” Currently, Canon I.1.2.j mentions minority reports for Standing Commissions but provides no guidance to Standing Commissions about whether and under what circumstances one or more dissenting members of a Commission should be permitted to include formal minority report in a Commission’s Blue Book report. Our Commission did not answer this question, deferring to the Standing Commissions to work this out.

Create a Churchwide Policy on Name Changes in Church Records

In 2015 the General Convention considered canonical changes to the established processes for changing names in church records. In 2018, the Convention considered Resolution 2018-A088, and referred that out to the Archives of The Episcopal Church and the Executive Council for further review and dialogue. That consultation took place, and at its October 2020 meeting the Executive Council adopted a resolution that addresses the remaining concerns. The text of that resolution is as follows:

Resolved, That the Executive Council, meeting virtually October 9-12, 2020, has received and reviewed the Proposed Guidelines for Policy on Amending Church Records for Name and Gender Changes in response to 2018–A088; and be it further

Resolved, That the Executive Council commends to the Church said reports and directs the Archives of the Episcopal Church to promulgate said Guidelines to the whole of the Church; and be it further

Resolved, That the Executive Council offers its gratitude for the Archives of The Episcopal Church and our Trans Episcopal siblings in Christ, for their generous contributions and witness.

Revisions to the Standing Commission's Mandate

The Commission recommends two resolutions to make modest revisions to its mandate. Resolution [A033](#) "Amend Canon I.1.2.n.1.iii to Revise the Title of Executive Council's By-laws" would amend Canon I.1.2.n.1.iii to refer to the By-laws of the Executive Council as well as to the By-laws of the Domestic and Foreign Missionary Society. Resolution [A034](#) "Clarify the Standing Commission's Mandate" would update the mandate to cover the breadth of current interim bodies in Canon I.1.2.n.1.vi.

Recommendation for an Additional Standing Commission

A robust discussion about the consequences of the General Convention's 2015 elimination of 12 of the then 14 standing commissions resulted in the Commission concluding that the Church needs the ongoing work of one additional standing commission to cover critical areas of formation and ministry development. In Resolution [A037](#) "Establish a New Standing Commission on Formation and Ministry Development", we recommend adding a Standing Commission on Formation and Ministry Development to Canon I.1.2.n.

The Commission is also clear that there is a need to further consolidate the work of interim bodies around issues of social justice, advocacy, and policy development. Despite the efforts at consolidation in 2015, there continues to be a proliferation of interim bodies. In the interests of focused, efficient work, particularly given the brevity of time between the 80th and 81st General Conventions, the Commission recommends that the Presiding Officers and Executive Council, in consultation with the Executive Officer of General Convention, seek to consolidate any Task Forces proposed by the 80th General Convention.

Notification of Interim Body Appointments

Currently, under Canons I.1.2.c and f, the Presiding Officers have up to 90 days after the General Convention in which to make appointments to standing commissions and 120 days after the General Convention to notify The Episcopal Church of the appointments. In order to enable the standing commissions to organize and begin work sooner, we recommend Resolution [A038](#) "Shorten Period for Notification of Interim Body Appointments" to change these deadlines to 60 and 90 days, respectively.

General Board of Examining Chaplains

The General Board of Examining Chaplains (GBEC) currently has 22 members – considerably more than other boards and commissions. As the GBEC revises the way it administers and evaluates the General Ordination Examination, it has advised the Commission that it believes the size of its membership can and should be reduced. With a smaller board membership, the GBEC proposes that nominees for the board be selected by the Presiding Bishop in consultation with the GBEC board so that there will be assurance that people familiar with the various canonical areas of testing are represented. This proposed method of choosing board members differs from the usual procedure of

nominees being proposed by the Joint Standing Committee on Nominations, but in that the GBEC's work is primarily to advise and inform bishops, this new method of nominating board members may be appropriate. The GBEC requested the Commission's assistance in proposing a canonical change for this purpose. The Commission is giving full consideration to the GBEC's proposal but has not reached a consensus on this significant change in the GBEC board structure. We hope to complete this work and present a resolution in a supplemental report to the 80th General Convention.

3. General Convention and Rules of Order

Resolution 2018-A102 tasked the Treasurer of the General Convention, the Executive Council, the Joint Standing Committee on Program, Budget and Finance, and this Commission to prepare a report on the budget process that will enhance transparency, foster timely participation by the wider church, clarify roles in the budget development process, and promote effective collaboration. The Commission received periodic updates from the Task Force that was created to organize and complete this work. The Task Force was successful in reaching a consensus on recommendations to make significant changes to the budget process, including the elimination of the Joint Standing Commission on Program, Budget and Finance in favor of having the Executive Council be responsible for the development of a proposed triennial budget and the carrying of that proposal through and beyond General Convention. The Task Force recommends a series of resolutions in its Blue Book Report to amend the pertinent canons and rules of order.

The Commission studied and is proposing Resolutions requiring diocesan conventions to transmit their convention journals electronically to the Secretary of the House of Deputies (Resolution [A040](#) "Specify Electronic Transmission of Certain Documents and Records"); addressing the organization of Episcopal Church congregations in foreign lands within neither the jurisdiction of this Church nor of the Anglican Communion (Resolution [A046](#) "Amend Canon I.15.1 Concerning Certain Episcopal Church Congregations in Foreign Lands"); and prescribing the timing of mutual ministry reviews of officers of the DFMS and Executive Council (Resolution [A047](#) "Concerning the Timing of Mutual Ministry Reviews of DFMS and Executive Council Officers").

Work on the Joint Rules of Order was deferred in favor of more pressing work of the Commission. Certain Commission members are assigned to continue work on the Joint Rules after the submission of this report and in due time the Commission expects to make recommendations for the work of the 80th General Convention and the ongoing work of the Commission. Among the issues under discussion are the accessibility of General Convention in terms of its cost and length.

4. Formation

Largely in response to a recommendation of the 2012-2015 Task Force for Reimagining The Episcopal Church (TREC), the 2015 General Convention eliminated 12 of the then 14 Standing Commissions, and in doing so combined the work of two prior Standing Commissions (Constitution and Canons, Structure of the Church) into a single Standing Commission (the Standing Commission on Structure, Governance, Constitution and Canons). One consequence is that many tasks have come to this

Commission that sooner or later will require an in-depth review and reworking of Title III in support of the ministry of all. Further, a canonical update and cleanup of Title III is overdue. In the 2015-2018 triennium, this Commission found that these items were beyond the scope of what is possible given the breadth of the Commission's canonical mandate. Our 2018 Blue Book report articulated this concern, and we proposed Resolution 2018-136: Establish a Standing Commission on Formation and Ministry Development. General Convention declined to adopt the Resolution In favor of establishing three Task Forces: the Task Force on Clergy Formation & Continuing Education, the Task Force on Formation & Ministry of the Baptized, and the Task Force on Theological Education Networking.

Following the General Convention's action and recognizing the critical importance of formation, this Commission appointed a Formation Subcommittee to investigate how our church structures help or impede the formation of disciples for the Jesus Movement. To avoid duplicating efforts and to support fruitful sharing of effective ideas, the Formation Subcommittee reached out to the above-mentioned Task Forces to learn about their efforts. Since their timelines for organization did not align with the Commission's schedule of work, these efforts stalled. Similarly, efforts were made to coordinate with various other groups involved in formation, but those efforts have yet to bear fruit. The Subcommittee concluded that its work was made less effective by the lack of a clearly defined, stable structure with which to coordinate – i.e., a Standing Commission with appropriate mandate and jurisdiction.

Nevertheless, the Subcommittee reviewed the formation challenges now facing the church and concluded that those challenges fall into two related but distinct areas. First, our church has always been dedicated to forming disciples for the Jesus Movement. Given the steady demographic decline of our denomination, this mission has become especially urgent. Second, formation toward ordination is currently in a time of great flux. Dioceses still use the three-year residential model of seminary to train clergy but at a rapidly declining pace. Instead, dioceses are employing a variety of ways to form people for ordination locally. This raises questions about continuity, equality, inclusion and best practices of formational processes across the Church.

The Presiding Bishop has urged us to remember that we are the loving, liberating, and life-giving Jesus Movement. At the 79th General Convention the Presiding Bishop introduced The Way of Love as a formational framework for making disciples in this movement. The Commission discussed whether to recommend adding a staff position and Standing Commission dedicated to implementing this vision and assisting dioceses and congregations in their formational processes. However, we did not reach a broad consensus on whether this is the right time for such an effort. Instead, we urge the church to continue to discern how the greater church can develop strategies and resources to assist dioceses, congregations, seminaries, and the church at large in responding to God's call to make disciples in our shifting spiritual, social, and cultural landscape that remains grounded in the theology and polity of our church.

Finally, while the Commission is under no illusion that these measures will easily or quickly yield major improvements in achieving the church's formation goals and aspirations, we believe the need to try with these enhanced efforts is compelling.

5. Ecumenical Concerns

Through its Subcommittee on Ecumenical Concerns, the Commission followed the actions of the United Methodist Church and the Evangelical Lutheran Church in America (ELCA), and the proceedings of the Ecumenical Task Force established by the 2018 General Convention. We discussed the Executive Council's practice, per its By-laws, of inviting ELCA and Anglican Church of Canada representatives to attend Council meetings, with seat and voice. The Canons do not reflect the inclusion of additional ecumenical representatives at Executive Council meetings. The Subcommittee did not achieve consensus regarding a recommendation. Executive Council, however, at its January 2021 meetings, adopted amendments to its By-laws addressing this matter.

6. Title IV

There are two Title IV Resolutions in the Resolutions section of the Report ([A042](#) and [A044](#)). Other substantive Commission work on Title IV issues was underway but incomplete as this report was filed. The Commission expects to issue a supplemental report containing additional Title IV analysis and proposals.

7. Other Canonical Amendment Proposals

Throughout the course of the triennium, the Commission identified four sound proposals to amend the Canons and includes those in its Proposed Resolutions. As with its Title IV work, the Commission will continue to review suggested changes to other parts of the canons and include the results of that effort in a supplemental report.

Proposed resolutions

A031 Amend the Constitution and Canons Relating to Mergers of Dioceses

Resolved, the House of ____ concurring, That the 80th General Convention amend Article V, Section 4 of the Constitution to read as follows:

Art.V

Sec. 4. Whenever a new Diocese is formed and erected out of an existing Diocese or out of two or more existing Dioceses or parts of them, it shall be subject to the Constitution and Canons of the Diocese out of which it was formed, except as local circumstances may prevent, until the same be altered in accordance with such Constitution and Canons by the Convention of the new Diocese the formation process of the newly formed Diocese, including the adoption of its Constitution and Canons, shall be as set forth in the Canons.

~~Whenever a Diocese is formed out of two or more existing Dioceses, it shall be subject to the Constitution and Canons of that one of the said existing Dioceses to which the greater number of Members of the Clergy shall have belonged prior to the erection of such new Diocese, except as local circumstances may prevent, until the same be altered in accordance with such Constitution and Canons by the Convention of the new Diocese.~~

And be it further

Resolved, That Canon I.10 be amended to read as follows:

Can.I.10

Sec. 1. Whenever a new Diocese is proposed to be formed within the limits of any Diocese, or by the junction of two or more Dioceses, or parts of two or more Dioceses, the Ecclesiastical Authorities and the Standing Committees of the Dioceses involved in the proposed new diocese shall submit for approval to the Conventions of each Diocese involved a joint agreement of union setting forth their agreements, including the manner of determining the Bishop Diocesan and other Bishops (if any), the provisions of the Constitution and Canons of the new Diocese, and such other matters as may be necessary or proper. Upon approval by the Conventions of each of the involved Dioceses, the joint agreement of union shall be submitted for ratification by the General Convention no less than ninety days prior to the first legislative day of the next meeting of the General Convention.

Can.I.10

Sec. 2. Promptly after ratification by the General Convention, the Ecclesiastical Authority of the new Diocese, as set forth in the joint agreement of union, shall call the ~~Primary~~ first Convention of the new Diocese, for the purpose of enabling it to organize, and shall fix the time and place of holding the same, such place being within the territorial limits of the new Diocese.

Can.I.10

Sec. 3. Whenever one Diocese is about to be divided into two Dioceses, the Convention of such Diocese shall declare which portion or portions thereof ~~are~~ is to be in the new Diocese, and shall make the same known to the General Convention before the ratification of such division.

Can.I.10

Sec. 4. Whenever a new Diocese shall have organized in *its first* ~~Primary~~ Convention in accordance with the provisions of the Constitution and Canons in such case made and provided, and in the manner prescribed in the previous Sections of this Canon, and shall have chosen a name and acceded to the Constitution of the General Convention in accordance with Article V, Section 1 of the Constitution, and shall have laid before the Executive Council certified copies of the Constitution adopted at its *first* ~~Primary~~ Convention, and the proceedings preparatory to the formation of the proposed new Diocese, such new Diocese shall thereupon be admitted into union with the General Convention.

Can.I.10

Sec. 5. In the event of the erection of an Area Mission into a Diocese of this Church, as provided in Article V, Section 1 of *the Constitution*, the Convocation of the Area Mission shall be entitled to elect Deputies to the succeeding General Convention, and also to elect a Bishop. The jurisdiction previously assigned to the Bishop in the Area Mission shall be terminated upon the admission of the new Diocese.

Can.I.10

Sec. 6. When a Diocese and one or more other Dioceses that were formed either by division therefrom or by erection into a Diocese or a Missionary Diocese formed by division therefrom, shall desire to be reunited into one Diocese, the proposed reunion must be initiated by the approval of the Conventions of the involved Dioceses of a joint agreement of union setting forth their agreements, including the manner of determining the Bishop Diocesan and other Bishops (if any), provisions of the Constitution and Canons of the new Diocese, and such other matters as may be necessary or proper. If the agreement of the Dioceses is made and the consents of their Conventions are given more than three months before the next meeting of the General Convention, the fact of the agreement and consents shall be certified by the Ecclesiastical Authority and the Secretary of the Convention of each involved Diocese to all the Bishops of the Church having jurisdiction and to the Standing Committees of all the Dioceses; and when the consents of a majority of such Bishops and of a majority of the Standing Committees to the proposed reunion shall have been received, the facts shall be similarly certified to the Secretary of the House of Deputies of the General Convention, and thereupon the reunion shall be considered complete. But if the agreement is made and the consents given within three months of the next meeting of the General Convention, the facts shall be certified instead to the Secretary of the House of Deputies, who shall lay them before the two Houses; and the reunion shall be deemed to be complete when it shall have been approved by a majority vote in the House of Bishops, and in the House of Deputies.

Can.I.10

Sec. 7. When the union of two or more Dioceses or portions of Dioceses or the reunion of the two or more Dioceses shall have been completed, the facts shall be certified to the Presiding Bishop and to the Secretary of the House of Deputies. Thereupon the Presiding Bishop shall notify the Secretary of the House of Bishops of any alteration in the status or style of the Bishop or Bishops concerned, and the Secretary of the House of Deputies shall strike the name of any Diocese that will cease to exist or is being renamed from the roll of Dioceses in union with the General Convention and, if appropriate, amend the name of the newly united Diocese on the roll of Dioceses in union with the General Convention.

EXPLANATION

These amendments allow Dioceses more flexibility when planning mergers or formation of new Dioceses from Dioceses or portions of one or more Dioceses by deferring to the Canons for the

details of the formation process. As the church gains more experience with this process, future changes to the process can be made at one General Convention to facilitate the formation or combination of the Dioceses rather than requiring two General Conventions to approve a change to the Constitution.

The Article V, Section 4 changes proposed in this Resolution build on the efforts of the Standing Commission in the prior two triennia. The intent of the changes is to build greater flexibility into the opportunities dioceses may identify for merger, unification and such. The structure of the revisions is to move more details into the canons, hence the proposed amendments to Canon I.10.

A032 Amend Canon III.11.9.b to Correct an Oversight in a 2018 Canonical Amendment

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon III.11.9.b by adding a new Section 2 and renumbering all subsequent sections, as follows:

Can.III.11

Sec. 9. Other Bishops

b. Bishops Suffragan

1. If a Diocese discerns a need for another Bishop due to the extent of diocesan work, the Diocese may elect a Bishop Suffragan in accordance with Canon III.11.1 and this Canon III.11.9.b.
2. *Before the election of a Bishop Suffragan in a Diocese, the consent of a majority of the Bishops exercising jurisdiction and of the several Standing Committees must be obtained.*
- ~~3.~~
- i. A Bishop Suffragan shall act as an assistant to and under the direction of the Bishop Diocesan.
- ii. Before the election of a Bishop Suffragan in a Diocese, the Bishop Diocesan shall submit a consent with a description of the role and the duties of the Bishop Suffragan to the Convention of the Diocese.
- ~~3.~~ 4. The tenure of office of a Bishop Suffragan shall not be determined by the tenure of office of the Bishop Diocesan.
- ~~4.~~ 5. No Bishop Suffragan, while acting as such, shall be Rector, but may serve as Member of the Clergy in charge of a Congregation.

EXPLANATION

The amendment corrects and unintended oversight of the 79th General Convention, which inadvertently deleted the requirement of consents to a Diocese's election of a Bishop Suffragan.

A033 Amend Canon I.1.2.n.1.iii to Revise the Title of Executive Council's By-laws

Resolved, the House of ___ concurring, That the 80th General Convention amend Canon I.1.2.n.1.iii to read as follows:

Can.I.1

Sec. 2

n. There shall be the following Standing Commissions:

1. A Standing Commission on Structure, Governance, Constitution and Canons. It shall be the duty of the Commission to:

iii. On the basis of such review, suggest to the Domestic and Foreign Missionary Society *and to the Executive Council of the General Convention* such amendments to ~~its~~ *their* respective By-laws as in the opinion of the Commission are necessary or desirable in order to conform the same to the Constitution and Canons.

EXPLANATION

The Standing Commission's canonical mandate directs it to review the By-laws of the Domestic and Foreign Missionary Society and suggest amendments where appropriate. The proposed amendment adds the Executive Council's By-laws to this provision.

A034 Clarify the Standing Commission's Mandate

Resolved, the House of ___ concurring, That the 80th General Convention amend Canon I.1.2.n.1.vi to read as follows:

Can.I.1

Sec. 2

n. There shall be the following Standing Commissions:

1. A Standing Commission on Structure, Governance, Constitution and Canons. It shall be the duty of the Commission to:

vi. Study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, ~~and~~ Boards, Agencies *and other governing bodies* to determine the necessity for their continuance and the effectiveness of their functions and, *where appropriate*, to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new Committee, Commission, Board, ~~or~~ Agency or *other governing body*, it shall, wherever feasible, be referred to this Standing Commission for its consideration and advice.

EXPLANATION

The Standing commission's mandate obliges it to undertake a periodic review of certain of the church's governing bodies. This Resolution would broaden that to include all church governing bodies.

A035 Allow Lay Persons Who Become Ordained and Priests Who Become Bishops to Serve Out Their Terms on Standing Commissions

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon I.1.2.a to read as follows:

Can.I.1

Sec. 2

a. The General Convention by Canon may establish Standing Commissions to study and draft policy proposals on major subjects considered to be of continuing concern to the mission of the Church. The Canon shall specify the duties of each Standing Commission. Standing Commissions shall be composed of five Bishops, five Priests and/or Deacons of this Church and ten Lay Persons, who shall be confirmed adult communicants of this Church in good standing. The Priests, Deacons, and Lay Persons are not required to be Deputies to General Convention. *Notwithstanding Canons V.4.1.b and V.4.2.b, a Lay member of a Standing Commission who is ordained Presbyter or Deacon, or a Presbyter or Deacon who is consecrated a Bishop before the next General Convention, shall not thereby become ineligible to continue to serve on the Standing Commission through the next succeeding General Convention.*

EXPLANATION

This Resolution would avoid the resignation of a member of a church interim body that is now required in many cases when the member becomes ordained or is consecrated a bishop. The Standing Commission believes this change will enhance the continuity and productivity of interim bodies.

A036 Conform Joint Rule of Order VII.18 to Canon I.2.1.d

Resolved, the House of ____ concurring, That the 80th General Convention amend Joint Rule of Order VII.18 to read as follows:

JR.VII

18. The Joint Standing Committee on Nominations shall be composed of three Bishops, three Presbyters, and six Lay Persons. Members who are Presbyters or Lay Persons shall have served as deputies to the most recent General Convention and will continue to serve as members of the Joint Standing Committee ~~through~~ *until* the next succeeding General Convention.

EXPLANATION

This Resolution proposes to clarify that a member of the Joint Standing Committee on Nominations serves until the end of the next succeeding General Convention.

A037 Establish a New Standing Commission on Formation and Ministry Development

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon I.1.2.n by adding a new subsection 4 thereto, to read as follows:

4. A Standing Commission on Formation and Ministry Development. The Commission shall coordinate and encourage the development of all orders of ministry, encouraging and engaging all the baptized in the work of building up the church and developing best practices to ensure all churches benefit from the diversity of leadership gifts God has given us.

It shall be the duty of the Commission to:

- i. Recommend policies and strategies to the General Convention for the affirmation, development, and exercise of ministry by all baptized persons (lay persons, bishops, priests and deacons).*
- ii. Support Diocesan Commissions on Ministry in their support of the ministry of all the baptized, as set forth in Title III Canons 1 & 2.*
- iii. Encourage the recognition of daily life ministries by Diocesan Commissions on Ministry, congregations, and dioceses, so that those ministries are celebrated as expressions of the ministry of all the baptized, worthy of equal respect with ordained vocations.*
- iv. In collaboration with the churchwide office overseeing formation, develop and recommend to the General Convention comprehensive and coordinated policies for people across all ages and stages of life for lifelong formation as seekers and followers of Jesus.*
- v. Recommend strategies to General Convention for the development and support of networks of individuals, diocesan committees and commissions, agencies and institutions engaged in recruitment, gifts of discernment, education and training for ministry, leadership development, hiring, and appointments.*
- vi. Study the needs and trends of discernment and vocational opportunities for ordained leaders and lay professionals within the Church and the appropriate formation required to live into those opportunities.*
- vii. Collaborate with those developing lay pathways grid and the Association of Episcopal Deacons to raise awareness of the competencies promulgated by those groups as guidelines for formation for those orders of ministry.*

viii. Recommend policies and strategies to the General Convention to ensure the fair hiring and compensation of lay and ordained employees in all ministry settings, with special attention to parity across those lines which have historically divided us, including but not limited to race, color, ethnic origin, national origin, sex, marital status, sexual orientation, gender identity and expression, order of ministry, disabilities, or age, except as otherwise provided by these Canons.

EXPLANATION

As explained in the report to the 80th General Convention of the Standing Commission on Structure, Governance, Constitution and Canons (otherwise known as their blue book report), during this triennium it has become clear that there is significant work needed in this area. Many of the tasks that have come to the Commission have exceeded its mandate. Restoring a single Standing Commission to focus on ministry and formation would allow much more significant work in support of the ministry and formation of all the baptized. This resolution is supported by the Task Force on Clergy Formation & Ministry of the Baptized and the Task Force on Theological Education Networking.

A038 Shorten Period for Notification of Interim Body Appointments

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon I.1.2 .c and f to read as follows:

Can.I.1

Sec. 2

c. The Presiding Bishop shall appoint the Episcopal members and the President of the House of Deputies shall appoint the Lay and other Clerical members of each Commission as soon as practicable after the adjournment of the General Convention, but not later than ~~90~~ 60 days after adjournment. Episcopal members appointed after the adjournment of any General Convention at which a Presiding Bishop is elected shall be appointed by the Presiding Bishop-elect. Vacancies shall be filled in similar manner; provided however, that vacancies occurring within one year after the next regular General Convention shall not be filled unless requested by the Commission.

f. The Executive Officer of the General Convention shall, not later than ~~120~~ 90 days following the meeting of the General Convention, notify the members ~~of the General Convention of the Commission appointments and~~ appointed to each Commission of their appointment and of their duty to present reports to the next Convention and shall schedule an organizational meeting for each Commission. One year prior to the opening day of the Convention, the Executive Officer ~~of the General Convention~~ shall remind the Chairs and Secretaries of all Commissions of this duty.

EXPLANATION

This Resolution proposes to advance by 30 days the appointments (and notifications thereof) to Standing Commissions, to enable the Commissions to start work sooner.

A039 Use More Precise Language in Canon III.11.3.c as Amended by Resolution 2018-A282

Resolved, the House of ____ concurring, That the 80th General Convention of The Episcopal Church amend Canon III.11.3.c to read as follows:

Can.III.11

Sec. 3

c. Testimonials required of the Standing Committee by this ~~Title~~ Canon must be signed by a majority of the whole Committee, at a meeting duly convened, except that testimonials may be executed in counterparts, any of which may be delivered by facsimile or other electronic transmission, each of which shall be deemed an original.

EXPLANATION

This Resolution proposes to use the more precise “Canon” in lieu of “Title.”

A040 Specify Electronic Transmission of Certain Documents and Records

Resolved, the House of ____ concurring, That the 80th General Convention of The Episcopal Church amend Canon I.1.1.e to read as follows:

I.1.1.

e. It shall be the duty of the Secretary of the House of Deputies, whenever any alteration of the Book of Common Prayer or of the Constitution is proposed, or any other subject submitted to the consideration of the several Diocesan Conventions, to give notice thereof to the Ecclesiastical Authority of the Church in every Diocese, as well as to the Secretary of the Convention of every Diocese, and written evidence that the foregoing requirement has been complied with shall be presented by the Secretary to the General Convention at its next session. All such notices shall be sent by *electronic means* ~~certified or registered mail~~, with the Secretary's certificates to be returned. The Secretary shall notify all diocesan Secretaries that it is their duty to make known such proposed alterations of the Book of Common Prayer, and of the Constitution, and such other subjects, to the Conventions of their respective Dioceses at their next meeting, and to certify to the Secretary of the House of Deputies that such action has been taken.

And be it further

Resolved, That the 80th General Convention of The Episcopal Church amend Canon I.6.5.a to read as follows:

I.6

Sec. 5

a. It shall be the duty of the Secretary of the Convention of every jurisdiction to forward to the Secretary of the House of Deputies *by electronic means*, immediately upon publication, ~~two copies of the Journals~~ *one (1) copy of the Journal* of the Convention of the jurisdiction, together with episcopal charges, statements, and such other records in ~~paper or~~ *electronic* format as may show the state of the Church in that jurisdiction, and ~~two copies~~ *one (1) copy* to the Archives of the Church in ~~electronic or~~ *electronic* format as prescribed by the Archivist of the Church.

EXPLANATION

Electronic transmission of these notices and of diocesan convention journals will save paper and money.

A041 Amend Certain Joint Rules of Order to Permit Meeting by Electronic Means

Resolved, the House of ____ concurring, That the 80th General Convention amend Joint Rules of Order II.10.b, II.10.c and III.11 to read as follows:

II.10.

b. Organization. The Joint Standing Committee shall elect its Chair from its membership, and such other officers as needed.

The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the Budget, as well as Sections on Funding and Presentation, the size and composition of the several Sections to be determined by the Joint Standing Committee.

The Chairs of each Section shall be elected by the Joint Standing Committee; the several Sections shall elect their own Secretaries from among their own membership.

The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; provided, however, that final action on Budget shall be taken only by the full Committee, either in meeting assembled or by *electronic means* ~~a vote by mail~~.

c. During the interim between regular Meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose.

Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof.

In respect of the Budget for The Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by *electronic means* ~~mail~~, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention.

III.11.

11. Each proposal for legislative consideration, however addressed to the General Convention or to either House thereof, received prior to a date in advance of the Convention agreed upon by the Presiding Bishop and the President of the House of Deputies, shall be referred by *electronic means* ~~mail~~ to the proper Standing Committee or Special Committee of the appropriate House, the Presiding Bishop making the referrals to the Committees of the House of Bishops and the President of the House of Deputies making the referrals to the Committees of that House.

EXPLANATION

This Resolution proposes authorizing meetings and votes by electronic means, and sending materials electronically, for convenience and cost savings.

A042 Permitting Sending Required Notices and Other Papers by Electronic Means

Resolved, the House of ____ concurring, That the 80th General Convention of The Episcopal Church amend Canon IV.19.20 to read as follows:

Sec. 20. Notices or other papers to be served according to procedures of this Title shall be deemed to have been duly served if a copy is delivered to the person to be served, is left with an adult resident of the abode of the person to be served, ~~or~~ is mailed by certified mail to the person's usual place of abode, *or is sent by electronic means with receipt confirmed in writing*. Notice by publication shall be made in a newspaper of general circulation in the jurisdiction of the person's usual place of abode. Acceptance of service renders unnecessary any further process.

EXPLANATION

This Resolution authorizes sending certain Title notices and documents electronically.

A043 Striking Outdated Reference to Provincial Court of Review

Resolved, the House of ____ concurring, That the 80th General Convention of The Episcopal Church amend Canon I.15.10.a to read as follows

I.15

Sec. 10. In the case a Member of the Clergy in charge of a Congregation or otherwise authorized to serve the Church in a foreign land shall be accused of any offense under the Canons of this Church:

- a. With the permission of the Presiding Bishop, the Bishop in Charge and the Council of Advice may (i) engage a Diocese of this Church to provide the needed Disciplinary Structures to fulfill the requirements of the Canons of this Church, or (ii) establish among the Congregations of the Convocation the needed Disciplinary Structures to fulfill the requirements of the Canons of this Church. In either case, the ~~Provincial~~ Court of Review shall either be that of the Diocese providing the needed Disciplinary Structures or that of the Province of the Convocation; and, for the purposes of implementing the provisions for Ecclesiastical Discipline (Title IV) of a member of the Clergy, the Bishop in Charge shall serve the function reserved for the Bishop Diocesan, except that the Presiding Bishop must approve any Accord, any Agreement for Discipline and the terms of any Order, and pronounce the Sentence.

EXPLANATION

This proposed amendment strikes what is now an outdated reference to the Provincial Court of Review. The reference is in Canon I.15.10, which deals with discipline of Episcopal clergy serving in a congregation in a foreign land. Canon I.15.10 provides for some flexibility in disciplinary structures when the regular structures may not be appropriate or workable. The Commission believes that the reference to the "Provincial Court of Review" should be changed to simply "Court of Review."

The Commission notes that there are two references to "Provincial Court of Review" in Canon IV.20.3.i but, since those provisions are transitional (from the former Title IV to the current Title IV), those references seem appropriate.

A044 Amend Canon IV.14.4 Provisions for Notices of Accords

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon IV.14.4 by striking it in its entirety and replacing it as follows:

~~Sec. 4. A copy of the Accord shall be sent to the Complainant, the Complainant's Advisor, the Respondent, the Respondent's Advisor, the Respondent's counsel, if any, the Church Attorney, the president of the Disciplinary Board, and the Bishop Diocesan by the Conciliator or the president of the Conference Panel (whichever the matter was before when the Accord was reached) on the date on which the Accord is signed. If the Accord was reached between the Bishop Diocesan and Respondent under Canon IV.9, the Bishop Diocesan shall send a copy of the Accord to the president~~

~~of the panel to which the matter is assigned and the persons listed in this Section on the date the Accord becomes effective and irrevocable.~~

Sec. 4. *In the case of any Accord that has become effective:*

a. A copy of the Accord shall be sent to the Complainant, the Complainant's Advisor, the Complainant's counsel, if any, the Respondent, the Respondent's Advisor, the Respondent's counsel, if any, the Church Attorney, the president of the Disciplinary Board, and the Bishop Diocesan by the Conciliator or the president of the Conference Panel (whichever the matter was before when the Accord was reached), the Presiding Bishop, the President of the House of Deputies and the Secretary of the General Convention on the date on which the Accord is signed.

b. If the Accord was reached between the Bishop Diocesan and Respondent under Canon IV.9, the Bishop Diocesan shall send a copy of the Accord to the president of the panel to which the matter is assigned and the persons listed in subsection a. of this section, on the date the Accord becomes effective and irrevocable.

c. In the case of any Accord pertaining to a Bishop, the Presiding Bishop shall provide a full and complete copy of the Accord to (i) in the case of a Bishop Diocesan, Bishop Suffragan serving under Article II.5, or Bishop serving under Canon III.13, to the Standing Committee of that Diocese, (ii) in the case of a Bishop Suffragan, Bishop Coadjutor, or Assistant Bishop, to the Bishop Diocesan and the Standing Committee of that Diocese.

EXPLANATION

The proposed amendment to Canon IV.14.4 clarifies the timing and recipients of notices of Accords and Orders. A version of this amendment was proposed by the Standing Commission in Resolution 2018-A132; that version also addressed certain other matters. (See the Commission's 2018 Blue Book report at pp. 446-449.) The General Convention did not adopt 2018-A132, instead referring it back to the Standing Commission. The Commission continues to study the other aspects of Resolution 2018-A132 and may have a further proposal for canonical changes in its supplemental report.

A045 Amend Canon I.19.2.b to Update a Word

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon I.19.2.b to read as follows:

b. Every judgment rendered under this Section shall be in writing and shall be made a matter of permanent record in the ~~Archives~~ records of the Diocese.

EXPLANATION

Many dioceses do not maintain formal archives, hence this proposal to strike "Archives" and replace it with "records."

A046 Amend Canon I.15.1 Concerning Certain Episcopal Church Congregations in Foreign Lands

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon I.15.1 to read as follows:

Sec. 1. It shall be lawful, under the conditions hereinafter stated, to organize a Congregation in any foreign land and not within the jurisdiction of any Missionary Bishop of this Church nor within any Diocese, Province, or Regional Church of the Anglican Communion *by action of the Anglican Consultative Council.*

EXPLANATION

This Resolution proposes to require approval of the Anglican Consultative Council prior to organizing a congregation under the circumstances described in Canon I.15.1, consistent with the polities of The Episcopal Church and the Anglican Communion.

A047 Concerning the Timing of Mutual Ministry Reviews of DFMS and Executive Council Officers

Resolved, the House of ____ concurring, That the 80th General Convention amend Canon I.4.2.j to read as follows:

j. The Officers of the Domestic and Foreign Missionary Society and the Officers of the Executive Council, and a committee of six members of Executive Council who are not officers, shall engage in a mutual ministry review every ~~eighteen~~ 24 months, facilitated by a consultant selected by the Chair and the Vice-Chair. *The mutual ministry review shall commence mid-triennium.*

EXPLANATION

In 2019, Executive Council members heard a report on the 2018 Mutual Ministry Review. The recommendation from the consultant and others, who participated in the review, is that 18 months is too short a period between reviews to be cost effective or to allow enough time between reviews to gain new information. In addition, some Executive Council members in their first triennium experienced a disconnect upon hearing a report about the previous triennium.

STANDING COMMISSION ON WORLD MISSION

Membership

Ms. Martha Gardner, <i>Chair</i>	Massachusetts, I	2024
The Rev. Elizabeth Frank, <i>Vice-Chair</i>	Ohio, V	2024
The Rev. Grey Maggiano, <i>Secretary</i>	Maryland, III	2024
Ms. Emily Badgett	North Carolina, IV	2021
The Rev. Grace Burton-Edwards	Atlanta, IV	2021
Ms. Grecia Christian Reynoso	Dominican Republic, IX	2024
Canon Judith Conley	Arizona, VIII	2024
The Rt. Rev. Francisco Duque	Colombia, IX	2021
The Rt. Rev. Alan Gates	Massachusetts, I	2024
Mr. Matt Gobush	Virginia, III	2021
Ms. Helena Mbele-Mbong	Convocation of Episcopal Churches in Europe, II	2021
Dr. Martin McCann	Atlanta, IV	2021
The Rt. Rev. José McLoughlin	Western North Carolina, IV	2024
The Rt. Rev. Rafael Morales	Puerto Rico, IX	2024
The Rev. Judy Quick	Alabama, IV	2021
Ms. Denise Reovan	Virgin Islands, II	2024
Ms. Angela Smith	Western Kansas, VII	2024
The Rt. Rev. William Stokes	New Jersey, II	2021
The Rev. Irene Tanabe	Hawaii, VIII	2024
Mr. John Tull	Florida, IV	2024
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Ms. Karen Longenecker, Diocese of Rio Grande left in 2019, replaced by Mr. John (Jack) Tull, Diocese of Florida.

Representation at General Convention

Canon Judith Conley, Diocese of Arizona
The Rev. Judy Quick, Diocese of Alabama
The Rev. Elizabeth Frank, Diocese of Ohio, Alternate
Ms. Greycia Christian Reynoso, Diocese of the Dominican Republic
Mr. John (Jack) Tull, Diocese of Florida
The Rt. Rev. Francisco Duque, Bishop of Colombia
The Rt. Rev. Alan Gates, Bishop of Massachusetts
The Rt. Rev. José McLoughlin, Bishop of Western North Carolina
The Rt. Rev. Rafael Morales, Bishop of Puerto Rico
The Rt. Rev. William Stokes, Bishop of New Jersey

Acknowledgements

The Commission wishes to thank the Rev. Canon C. K. Robertson, Ph.D., Canon to the Presiding Bishop for Ministry Beyond The Episcopal Church, and the Rev. David Copley, Director of Global Partnerships and Mission Personnel, who met regularly with the Commission and shared valuable expertise. Ms. Rebecca Linder Blachley, Director of the Office of Government Relations, assisted with several projects, and we thank her.

We thank the following staff officers who gave reports to the Commission as part of surveying the global work of the church:

- The Rev. Canon Robert Edmunds, Staff Officer, Middle East
- Archdeacon A. Paul Feheley, Interim Partnership Officer for Africa
- Ms. Lynnaia Main, Episcopal Church Representative To The United Nations
- The Rev. Glenda McQueen, Staff Officer, Latin America & the Caribbean
- The Rev. Canon Bruce W. Woodcock, Partnership Officer for Asia and the Pacific

The Commission offers deep thanks to those who served as language interpreters and assisted with translation of documents, enabling us to carry out our work in both Spanish and English.

Mandate

Canon I.1.2.n.3

3. A Standing Commission on World Mission. It shall be the duty of the Commission to:
- i. Identify the global mission work carried out by the Domestic and Foreign Missionary Society, dioceses, congregations and mission organizations throughout the church.
 - ii. Consult with the above bodies to envision future directions for the church's global engagement.
 - iii. Develop policy proposals for world mission for consideration by General Convention.
 - iv. Discharge such other duties as shall from time to time be assigned by the General Convention.

Summary of Work

MANDATE

Resolution 2018-A208 of the 79th General Convention of The Episcopal Church (TEC) established a Standing Commission on World Mission with the mandate to identify global mission work and consult with those bodies to discern future directions for the church's global mission engagement, to offer ideas about policy proposals for General Convention, and to discharge other duties of the General Convention.

Throughout the triennium, the Standing Commission on World Mission (SCWM) met as an interim body in person, electronically, and by sub-committee to further the work to achieve its mandate.

Resolutions from previous General Conventions and the 2003 Standing Commission on World Mission Companions in Transformation have informed the work of the SCWM.

MESSAGE TO THE CHURCH

The Standing Commission on World Mission invites the Church to embrace and remember this call to God's mission throughout the world:

BECOMING A WORLD WHERE LOVE IS THE WAY:

Crossing Boundaries, Listening Deeply, Living Like Jesus, Together

Crossing Boundaries

Following the example of Jesus, who sent disciples into all the world, the Episcopal Branch of the Jesus Movement is a global church. We gather as communities in North, Central, and South America, in Europe, and in Asia. We are part of the Anglican Communion. We work with ecumenical and inter-religious partners. We cross global boundaries at home through relationships with migrants and refugees. When we cross boundaries with love, we are sharing in God's mission.

Where is God calling us?

Listening Deeply

As we cross boundaries, with the help of God, we strive to listen deeply to one another and to the Word of God in Holy Scripture. We discover and honor sacred differences in cultures and people. We repent of harm caused by failing to listen and failing to honor one another. We hear the Spirit calling us to renounce evil powers that corrupt and destroy the creatures of God.

Whose voices need to be heard?

Living Like Jesus

Jesus proclaimed the good news of God's reign of love in this world. Episcopal Church mission priorities of evangelism, reconciliation, and creation care have global dimensions. Following Jesus in the Way of Love calls us to work with global partners to address racism, environmental degradation, human migration, challenges to human rights, poverty, and the need for sustainable development - all while proclaiming God's love, mercy, and hope.

What would Jesus say or do today?

Together

God's mission is to make us one together, to restore all people to unity with God and each other in Christ. We have far to go, but as we walk together, God is at work among us. We trust that God has

poured out gifts on the whole Church. We seek mutual, interdependent relationships – offering and receiving gifts, respecting differences, sharing joys and sorrows, learning from each.

How will we walk more closely together?

GUIDING PRINCIPLES

The SCWM discerned Guiding Principles to frame the work of and offer a direction for global mission for The Episcopal Church and its mission partners around the world, to walk the Way of Love in a global context. The Message to the Church, *Becoming a World Where Love Is the Way*, embodies these Guiding Principles.

The Guiding Principles will be a Resolution to the 80th General Convention of the Episcopal Church, to include an invitation to all dioceses and jurisdictions to have a Global Mission Advocate to nurture the ongoing work of global mission.

Guiding Principles for World Mission

Jesus affirmed the Greatest Commandment and its corollary: “‘You shall love the Lord your God with all your heart, and with all your soul, and with all your mind.’ This is the greatest and first commandment. And a second is like it: ‘You shall love your neighbor as yourself.’ On these two commandments hang all the law and the prophets.” (Matthew 22:37-40)

Jesus also gave a New Commandment: “I give you a new commandment, that you love one another. Just as I have loved you, you also should love one another.” (John 13:34)

Jesus’ final act was to give the Great Commission: to bring his Word to all nations.

Our dream is of a Beloved Community where all of God’s children are included; where the gifts of all are honored. In baptism we are called to be companions, which means standing with, traveling with, and sharing bread with one another. We are members of a global community, beginning with ourselves – the Domestic and Foreign Mission Society of the Protestant Episcopal Church – the Anglican Communion, Christians, and people of other faiths or no faith throughout the world.

World mission is living into God’s mission of reconciling love in a global context, crossing boundaries of differences, meeting Christ in one another, as we walk the way of Love together throughout the world in true relationship.

World mission implies being present with others, as Jesus became incarnate and was present with us. As companions in mission, we are open to one another, learning from one another, and through that experience being transformed as we reach a deeper understanding of what it means to be Christians together, even across boundaries that might otherwise divide.

Every baptized Episcopalian has vowed to seek and serve Christ in all persons and to respect the dignity of all human beings. Jesus' Way of Love invites us to "GO" beyond our boundaries, our comfort zones, beyond the Red Door of our Churches. How do we live into this call in a global context?

The catechism of the Episcopal Church teaches that the mission of the church is to restore all people to unity with God and each other in Christ. How do we live into this mission in a global context?

Living out the Way of Love throughout the Global Beloved Community in the 21st Century involves:

- Emphasizing evangelism, reconciliation, and creation care.
- Working with partners of all ages and abilities to respect the dignity of every human being.
- Serving as a prophetic voice to keep before The Episcopal Church engagement with God's Mission in the world.
- Transforming with grace and humility the culture of world mission engagement beyond historic transactional relationships from a position of power towards mutual models of mission as companions.
- Celebrating various models of God's mission and embracing the full diversity of the Body of Christ in person, online, and in spirit.

Jesus sends us into the world to be His disciples of love: "Just as the Father has sent me, so I send you." (John 20:21)

Therefore, as followers sent by Jesus, we are all invited to follow these **Guiding Principles**:

- Think and imagine a world where love is the way.
- Commit to world mission that is incarnated in personal presence, meeting Christ in all whom we encounter, in our backyard or around the globe.
- Go the Way of Love: cross boundaries, listen deeply, and live like Jesus.
- Walk humbly the Way of Love with our companions in mission, in mutual discovery and deepening of God's reconciling love, learning together, praying together, worshipping together, as we transform and bless each other.
- Excite, inspire, and engage others to discover the joy of God's mission.

- Honor and embrace in mutual discovery the God-given gifts of all individuals, parishes, dioceses, their partners, and their communities.
- Nurture relationships to develop avenues for cross-cultural mission, local/global/pilgrimage, for all ages and abilities.
- Advocate for structural changes to support global mission issues, including promoting the dignity of all and honoring refugees, migrants, and asylum seekers everywhere.
- Honor our sacred differences while we unite as Beloved Community around God’s table.
- Support missionaries, from discernment, during their service, and upon their return.
- As we walk this Way of Love, address together the many issues of poverty, violence, oppression, threats to global health, and environmental degradation, often in a time of global upheaval.
- Remember that to “Go” can also mean “Go” by building relationships, learning, listening, encouraging across space through virtual presence and communication from where you are.
- Encourage all dioceses to have a Diocesan Global Mission Advocate.

O God, you have made of one blood all the peoples of the earth, and sent your blessed Son to preach peace to those who are far off and to those who are near: Grant that people everywhere may seek after you and find you; bring the nations into your fold; pour out your Spirit upon all flesh, and hasten the coming of your kingdom; through Jesus Christ our Lord. Amen. — Book of Common Prayer

COMMITTEE STRUCTURE

Four sub-committees were assigned to address the mandate:

1) Theology 2) Relationship 3) Advocacy 4) Communications

Theology Sub-Committee:

Purpose: To clarify the theology of mission – God’s mission – to guide the work of global mission throughout the Church

Activities:

The Theology Sub-Committee drafted the Guiding Principles for World Mission. The SCWM collaborated with the Office of Global Partnerships (OGP) and the Global Episcopal Mission Network (GEMN) to refine the Guiding Principles for World Mission.

The Theology Sub-Committee also addressed two aspects of theological education:

1. The degree to which World Mission is taught in Episcopal seminaries and Diocesan Schools of Ministry, via a questionnaire sent to these schools and
2. The availability of theological education for lay and clergy in TEC's non-US jurisdictions, via a questionnaire sent to the bishops of these jurisdictions.

World Mission formation in Episcopal Seminaries and Diocesan Schools of Ministry:

- In most seminaries, world mission was found to be an integral part of formation either in a specific course or part of other courses. It is central to the life and discipleship of churches and is part of the teaching of Anglican Studies. The findings from the Diocesan Schools of Ministry were less conclusive.

Theological Education in TEC's Non-US Dioceses and the Convocation:

- There is a need for further development of theological education for lay and clergy, most notably in the area of Anglican Studies. Few non-US jurisdictions have their own seminaries or schools of ministry and thus rely on other seminaries or institutions, Episcopal and non-Episcopal.
- Funding for course development and participation is another consideration.
- Many would welcome on-line courses, with foreign language capabilities, primarily in Spanish, but also in other languages, being mindful of issues such as payment options and availability of books.

Relationship Sub-Committee:

Purpose: To identify and coordinate with TEC staff, mission organizations, and diocesan/parish/individual mission advocates to share visions for the future of global mission

Activities:

- The Relationship Sub-Committee identified global mission work, collaborating with the OGP, resulting in a spreadsheet which highlights mission relationships of dioceses and parishes and mission organizations and agencies. Also noted are the Bi-Lateral and Covenant relationships of the Episcopal Church.
- Communication and collaboration with several of these entities have formed the content and direction of future paths of global mission engagement.
- The SCWM and the OGP encourage dioceses and parishes to complete the Episcopal Asset Map to capture global mission relationships.

Advocacy Sub-Committee:

Purpose: To raise a prophetic voice, build coalitions, speak truth to power and coordinate with the Office of Government Relations and other organizations to assess and address issues of global mission and promote the process of international engagement

Activities:

- The Advocacy Sub-Committee communicated and collaborated with the Office of Government Relations (OGR) to assess potential areas of support.
- The Advocacy Sub-Committee proposed several resolutions for the 80th General Convention to guide the work of the OGR and the Office of the Episcopal Church and the United Nations to advocate for global mission in the Church.
- The Advocacy Sub-Committee directed the work of a Constable Grant to develop Just War training materials for Episcopal Military and Veteran's Administration Chaplains.

Communications Sub-Committee:

Purpose: To affirm effective and diverse ways to communicate a consistent message of global mission, to engage and inspire the Episcopal Church for God's mission in the world

Activities:

- The Communications Sub-Committee advised other sub-committees to consider the messaging and ways to convey the message to the Church most effectively.
- The Communications Sub-Committee will ensure the implementation of the message and resources of global mission in multiple media.

CONSTABLE GRANTS

The SCWM collaborated with the OGP and GEMN to prepare a Constable Grant and to develop a Global Mission Toolkit with the Constable Grant Funds. This toolkit provides resources for individuals, parishes, dioceses, seminaries, and diocesan schools of ministry to encourage and inspire global mission. These resources include Bible studies, discussion and worship resources, videos, and webinars, available on the TEC website.

The SCWM sponsored a Constable Grant in partnership with the American Friends of the Episcopal Diocese of Jerusalem (AFEDJ) to develop a virtual pilgrimage of the Holy Land, highlighting themes of Jesus' life and ministry in current ministries in Israel, Palestine, Gaza, and Jordan. COVID travel

restrictions delayed the timing of the completion of the AFEDJ grant. The virtual pilgrimage will allow individuals, parishes, and dioceses to experience the land where Jesus lived, loved, and served and show how the ministries of the Episcopal Diocese of Jerusalem and Jerusalem Peacebuilders continue the work of Jesus today in the context of the complex political arena. These virtual resources will be available in multiple media.

"Bearing Witness: A Journey with Holy Land Christians towards Mercy, Justice, and Peace" (working title) will invite participants to reflect and respond to their deeper understanding of the witness of Christians in the Middle East by focusing on themes of Jesus's ministry:

1. Hope and Empowerment
2. Teaching
3. Healing
4. Overcoming Stigma and Breaking Barriers
5. Reconciliation and Peacemaking

The SCWM submitted and received a Constable Grant entitled "Military Chaplains Just War Education Project". The SCWM is collaborating with the office of the Bishop Suffragan for Armed Forces and Federal Ministries and coordinating with the Office of Government Relations in the administration of the project. Members of the SCWM serve on a steering committee with representatives from both offices to develop Just War training materials for the Episcopal Military and Veteran's Administration Chaplains, advised by experts in the field of Just War theory. A Project Director convened the panel of experts and the Advisory Board of Military Chaplains to develop the curricula for the Episcopal Military and Veteran's Administration Chaplains, with a consideration of a strategy to continue this work beyond the scope of the grant.

ADDITIONAL REPORTS

The Standing Commission on World Mission collaborated very closely with the Office of Global Partnerships throughout the triennium to ensure that the work of the SCWM supported the goals of the OGP and also its presence representing the Episcopal Church at the United Nations. We include their reports as follows:

The Office of Global Partnerships

We strive to be International bridge builders and reconcilers, focused on relationships and seeking a world where love is the way. We continue with our ministry of physical presence and walking along side our partners through our staff and missionary programs. In 2021 we celebrate our Young Adult Service Corps program, with 20 years of transforming lives and deepening faith through mission

engagement. We are developing new and innovative modes of ministry, with online meetings, resource development and programming through a diversity of social media platforms. Mission Personnel is engaged in a new creative border ministry initiative collaborating with four US dioceses and the Province of Mexico. In a fractured world, staying connected with our Anglican Communion family is more important than ever, and we are experiencing a significant increase in collaboration between dioceses, Provinces and agencies across the Anglican Communion.

The Episcopal Church at the United Nations

The Episcopal Church celebrated 75 years of active engagement with the United Nations in 2020. We continue to be faith leaders at the United Nations on a wide range of issues, including the care of creation, human rights, sustainable development and gender equality. In doing so, the office partners actively with the Anglican Communion and other faith-based and civil society partners in mutual engagement with the United Nations.

BUDGET RECOMMENDATIONS

In addition to funding for the Office of Global Partnerships, The Standing Commission on World Mission recommends the following budget allocations:

- \$5,000 to support the work of a Task Force on Pacifism and Just War as it continues its work online.
- \$50,000 to support the work of the Global Episcopal Mission Network over this triennium.
- \$90,000 for a Task Force on Translation and Interpretation, meeting over two triennia. \$30,000 for this triennium and \$60,000 for the next.

REFERENCES FOR THE SUMMARY OF WORK

Companions in Transformation: The Episcopal Church's World Mission in a New Century, Mission Vision Statement presented by the Standing Commission on World Mission to the 2003 General Convention

2018-A207 Encouraging Mission as Part of the Beloved Community, 79th General Convention of the Episcopal Church

Office of Global Partnerships of the Episcopal Church: <https://episcopalchurch.org/global-partnerships>

Global Episcopal Mission Network: <https://www.gemn.org/>

Office of Government Relations of the Episcopal Church: <https://episcopalchurch.org/office-government-relations>

Office of the Bishop Suffragan for Armed Forces and Federal Ministries:
<https://episcopalchurch.org/episcopal-federal-chaplains>

American Friends of the Episcopal Diocese of Jerusalem: <https://afedj.org/>

The Episcopal Church and the United Nations: <https://www.episcopalchurch.org/ministries/global-partnerships/episcopal-church-united-nations/>

Episcopal Relief & Development: <https://www.episcopalrelief.org/>

Episcopal Migration Ministries: <https://episcopalmigrationministries.org/>

Episcopal Asset Map: <https://www.episcopalassetmap.org/>

Proposed resolutions

A016 Adopt, Study, and Promote Guiding Principles for World Mission & Initiate Global Mission Advocate Program

Resolved, the House of ____ concurring, That the 80th General Convention adopt the following Guiding Principles as a foundation upon which it engages in mission:

- Think and imagine a world where love is the way
- Commit to world mission that is incarnated in personal presence, meeting Christ in all whom we encounter, in our backyard or around the globe
- Go the Way of Love: cross boundaries, listen deeply, and live like Jesus
- Walk the Way of Love with our companions in mission, in mutual discovery and deepening of God's reconciling love, learning together, praying together, worshipping together, as we transform and bless each other

- Excite, inspire, and engage others to discover the joy of God’s mission
- Honor and embrace in mutual discovery the God-given gifts of all individuals, parishes, dioceses, their partners, and their communities
- Nurture relationships to develop avenues for cross-cultural mission, local/global/pilgrimage, for all ages and abilities
- Advocate for structural changes to support global mission issues, including promoting the dignity of all and honoring refugees, migrants, and asylum seekers everywhere
- Honor our sacred differences while we unite as Beloved Community around God’s table
- Support missionaries, from discernment, during their service, and upon their return
- As we walk this Way of Love, address together the many issues of poverty, violence, oppression, and environmental degradation
- Remember that to “Go” can also mean “Go” by building relationships, learning, listening, encouraging across space through virtual presence and communication from where you are
- Encourage all dioceses to have a Diocesan Global Mission Advocate

and be it further

Resolved, That the General Convention commend these Guiding Principles to Episcopal seminaries, diocesan schools of ministry, dioceses and jurisdictions, and congregations for study and implementation and that they be encouraged to study and promote the Guiding Principles; and be it further

Resolved, That the General Convention encourage each diocese, jurisdiction, Episcopal seminary, and diocesan school of ministry to appoint at least one person to serve as a Global Mission Advocate to promote the study and use of the Guiding Principles and share with the Church promising global mission practices developed as these guiding principles are implemented alongside other models of ministry such as Asset-Based Community Development and the Sustainable Development Goals; and be it further

Resolved, That the Standing Commission on World Mission and the Office of Global Partnerships collaborate during the triennium with the Global Episcopal Mission Network to create a Network of Global Mission Advocates to share their experiences with the implementation, study, and promotion of the Guiding Principles. This Network shall provide guidance to the Standing Commission on World Mission on the practical application of the Guiding Principles and suggest amendments.

EXPLANATION

The nature and understanding of mission continuously evolve. As we strive to be a Beloved Community, the Standing Commission on World Mission presents these Guiding Principles for World Mission to frame the work of and offer a direction for global mission for The Episcopal Church and its mission around the world, to walk the Way of Love in a global context. Expanding on the work of Companions in Transformation presented by the SCWM to the General Convention in 2003 (2003-A150), the current Commission sought input from numerous people active in world mission – inter alia missionaries, academics, the Office of Global Partnerships, the Global Episcopal Mission Network (GEMN) – in developing these Guiding Principles.

It is recommended that these Guiding Principles be used along with the Global Mission Toolkit, which is being developed by SCWM with GEMN and the Office of Global Partnerships to guide worship, discussion and engagement in world-wide mission.

A017 Assessment of Past Colonialism in the Church's World Mission Ministries

Resolved, the House of ____ concurring, That the 80th General Convention acknowledge and grieve the participation of the Episcopal Church and its various entities and institutions in colonialism in North America, Latin America, Africa, and Asia; and warns of and laments colonial mindsets in the Church today; and be it further

Resolved, That the General Convention affirm that Colonialism and its continuing impacts are antithetical to the Gospel as proclaimed by our Savior Jesus Christ, and that we are all called to repent and atone for the evils perpetuated in the name of Christ in the missionary field; and be it further

Resolved, that the Standing Commission on World Mission (SCWM) encourage the Episcopal Church to use principles and practices which turn from the colonial mindset of the past towards mutuality of relationships in our mission, ministries, and outreach; and be it further

Resolved, That the General Convention direct the SCWM to deliver a report to the 81st General Convention on the historic role of the Episcopal Church in colonialism through its missionary work, and how and where a colonial mindset continues to prejudice our work in propagating the Gospel.

EXPLANATION

When the Church Missionary Society of the Episcopal Church met for the first time in 1828, the Rev. D. Wainwright offered the opening sermon which read in part: “The Indians of Western America and the isles of the Pacific are ignorant and degraded; the savage hordes of Africa are remote and intractable.” From the beginning, the missionary work of the Episcopal Church was wrapped up in the broader effort at colonization. In fact, the first missionary efforts undertaken in the Church were under the auspices of the Colonization Society.

Looking back we are now aware that Episcopal Missionary efforts, while always undertaken with the goal of propagating the Gospel all over the world, also suffered from the unmistakable connection to colonialism.

This resolution calls on the Church to review its missionary history from our founding to the present day in order to study and reflect upon the difficult reality of our complicity in colonialism and how we have unwittingly done harm to the propagation of the Gospel so that we can repent, ask forgiveness, make amends, and strive not to repeat those mistakes.

A018 Teaching World Mission and Theological Education Beyond the United States

Resolved, the House of ____ concurring, That the 80th General Convention, urge all seminaries and programs of formation to include world mission as a core part of their curriculum; and be it further

Resolved, That the General Convention recognize with appreciation offerings of Episcopal seminaries and other institutions of formation that reach beyond the United States, and urge these seminaries and other institutions to further collaborate with dioceses and jurisdictions outside the United States in developing their online course offerings to provide accessibility of courses and materials to those outside the United States, and take into consideration: cost, timing (if online discussion is required), languages, and certification, with an emphasis on Anglican studies; and be it further

Resolved, That the General Convention task the Standing Commission on World Mission with convening and leading a group composed of members of the Standing Commission, representatives of seminaries in the United States and of seminaries and diocesan programs outside the United States to collaborate and promote development of such courses.

EXPLANATION

Few of the jurisdictions outside the United States have seminaries or extensive programs of formation. They rely on the programs they are able to develop and on other institutions and seminaries – often non-Anglican – for theological education and training. Attending a seminary in the United States is not an option for most, for a variety of reasons. The need is particularly great in all aspects of Anglican studies: liturgy, theology, tradition and history. While some seminaries and other institutions offer some programming beyond their physical campuses, having more courses available online could considerably help to fill this gap and strengthen the offerings available within these jurisdictions. Courses available beyond the United States would benefit not only those in dioceses of The Episcopal Church, whether those seeking ordination or lay leaders, but also others throughout the Anglican Communion.

A019 Theological Education and Formation in Languages other than English

Resolved, the House of ____ concurring, That the 80th General Convention celebrate the efforts being made within The Episcopal Church and throughout the Anglican Communion to collaborate in offering theological education and formation in languages other than English; and be it further

Resolved, That the General Convention urge and promote increasing development and availability throughout The Episcopal Church of theological education and formation in languages other than English, including in our major seminaries and other programs of formation; and be it further

Resolved, That the General Convention encourage Spanish-speaking dioceses of The Episcopal Church to strengthen collaboration amongst themselves and with seminaries in the United States, and also with the Latin American Provinces and Spain to further develop and make widely available courses and materials in theological education and formation in Spanish; and be it further

Resolved, That the General Convention urge the seminaries and other institutions of formation, in collaboration with the non-US jurisdictions and the Standing Commission on World Mission to identify theological and other texts, especially in Anglican studies, most in need of translation for theological formation, and consult with the Office of Communications and others as appropriate to explore ways such translations can be made, following professional guidelines; and be it further

Resolved, That the Standing Commission on World Mission, working with the Office of Global Partnerships, be tasked with urging and following up on this initiative.

EXPLANATION

There is a great need to strengthen theological education in languages other than English. Few jurisdictions outside the United States have the resources to do this entirely on their own. Through greater collaboration amongst all Spanish-speaking provinces and dioceses, in particular, more quality materials and courses could be offered more widely, to the benefit of all.

In addition, very few materials pertinent to Anglican studies are available in any language other than English. French and Spanish, in particular, as well as Kreyòl, Chinese, and other languages are the primary language not only of significant parts of The Episcopal Church but throughout the Anglican Communion, making in-depth study of Anglican theology difficult for many members at all levels. There is a great need for more materials and translations not only in Spanish but also in French for the growing numbers of francophone Anglicans, not to mention other languages. By expanding theological education and formation in all languages in wide use in The Episcopal Church, the Church more fully embraces people whose primary language is other than English and becomes closer to becoming Beloved Community.

A020 Support Decade of Action to Achieve Sustainable Development Goals

Resolved, the House of ____ concurring, That the 80th General Convention express continued support for the ways in which the Sustainable Development Goals (SDGs) have become the cornerstone of development policy and action of the Episcopal Church's institutions, agencies, dioceses, and congregations and provided a framework for approaching the Church's call to eradicate poverty and promote sustainable development; and be it further

Resolved, That the General Convention encourage all parishes, dioceses, and jurisdictions to support the UN's Decade of Action (2020-30) to achieve the SDGs by (1) educating themselves about the SDGs using United Nations, Anglican Communion and Episcopal Church resources; (2) developing their own educational resources to translate the core Christian values and imperatives of the SDGs in ways that can be easily grasped, shared, and put into action; (3) undertaking self-audits to assess how their existing mission work and ministries already address the SDGs; and (4) sharing stories about how they are working toward the SDGs and furthering the work that Jesus calls all of us to do; and be it further

Resolved, That the General Convention commend and acknowledge Episcopalians who are already working towards the SDGs, including the Episcopal presence at the annual UN High-Level Political

Forum on the SDGs and Episcopal Relief & Development which continues to educate the Church about the SDGs and work toward the SDGs through its programs and priorities.

EXPLANATION

General Convention and Executive Council have previously affirmed the United Nations' Agenda 2030 and the Sustainable Development Goals (SDGs) through 2015-A021 Continue the Financial Commitment to International Development Programs (affirmed by Executive Council in October 2015), 2018-B026 Endorse the UN Sustainable Development Goals as the Basis for Policy and Action, and 2018-B027 Encourage Gender-Inclusive Responses to Climate Change. These resolutions have established the Church's endorsement of the overall goals of sustainable development and poverty eradication and the principle of using the SDG framework, as well as linking that support to concrete financial commitments of 0.7% of operating budgets. Episcopal Relief & Development has taken the lead in educating the Church about the SDGs, in addition to contributing to the Goals through its projects.

In September 2019, the UN Secretary-General called for a Decade of Action to advance achievement of the SDGs and acknowledge the need for action on global, local, and individual levels. The COVID-19 pandemic has impacted all 17 SDGs and shown that what began as a health crisis has quickly become a human and socio-economic crisis. As the pandemic continues to impede progress towards the SDGs, it also makes their achievement all the more urgent and necessary.

In response, the Church needs to expand its focus beyond funding to education at the parish and diocesan level so that all Episcopal faith communities can understand the Christian values and imperatives at the root of the SDGs. Existing UN, Anglican and Episcopal resources can be adapted to speak prophetically within local contexts. Similarly, the resolution seeks through self-audits to reveal existing ministries, local and global, which further the work that Jesus has called us to do as well as contribute to achievement of the SDGs. Reports on these self-audits would provide valuable input to the Church's representatives to the United Nations, enabling them to accurately map and lift up the Church's work to achieve the SDGs in the UN context.

A021 Support for the United Nations

Resolved, the House of ____ concurring, That the 80th General Convention applaud the United Nations on its 75th anniversary and recall the prophetic role Episcopalians and The Episcopal Church played in its inception, including modeling a universal fellowship of peace-loving communities, shaping its founding principles, supporting its formation in 1945 through the actions of General

Convention, and inspiring the Universal Declaration of Human Rights through the faithful public service of Eleanor Roosevelt and other Episcopalians; and be it further

Resolved, That the General Convention express gratitude to the United Nations for its leadership over three quarters of a century in promoting multilateralism and fostering dialogue among nations of the world, maintaining international peace and security, protecting human rights, delivering humanitarian aid, promoting sustainable development, and upholding international law; and be it further

Resolved, That the General Convention affirm the critical importance of the United Nations in addressing contemporary global challenges, including the spread of disease, dislocation of migrants and refugees, rise of climate change, persistence of poverty, discrimination in all its forms and intersectionalities, abuse of human rights, and threats of violence, conflict, and war; and be it further

Resolved, That the General Convention recommit The Episcopal Church to active engagement with the United Nations in its special consultative status with the UN Economic and Social Council and the observer organization status in the UN Framework Convention on Climate Change, and through the ministries of the Office of Global Partnerships and Mission Personnel and the Episcopal Church Representative to the UN, and the efforts of individual Episcopalians; and be it further

Resolved, That the General Convention urge all nations, especially the United States, to support the United Nations and its offices, programs and funds, as well as related specialized agencies through their active participation and full payment of their assessed financial contributions; and be it further

Resolved, That the General Convention call on all nations, especially the United States, to participate in the formulation, signature, ratification and implementation of United Nations Declarations, Treaties, Agreements and Conventions to resolve global concerns, especially those which protect the most vulnerable; and be it further

Resolved, That all Episcopalians seek ways to fulfill our baptismal covenant to “strive for justice and peace among all people, and respect the dignity of every human being” by endeavoring in our local parishes and dioceses to inform, educate, raise awareness, and develop programs to contribute to the work of the United Nations; and be it further

Resolved, That all Episcopalians observe United Nations Day annually on October 24, and pray for the UN’s continued success in building a more peaceful, just, and prosperous world in accord with Jesus’

call to us to love our neighbor as ourselves, care for our world, heal the sick, welcome the stranger, feed the hungry, serve the poor and proclaim the Good News; and be it further

Resolved, That the General Convention give thanks for the continued support and partnership of the Anglican Communion in common ministry at the United Nations and encourage collaboration and mutual support for all Anglicans while uplifting Episcopal voices and concerns through Episcopal representation at the United Nations.

EXPLANATION

On United Nations Day (October 24) 2020, the United Nations commemorated the 75th anniversary of its official founding. Presiding Bishop Curry invited Episcopalians to join him on Sunday, October 25th, in praying the “Prayer for Peace Among the Nations” (Book of Common Prayer, p. 816) as a prayer of solidarity while the world continues to work towards peace, justice, human rights and the full development and dignity of all peoples living in harmony with each other, our planet and its creatures. Established in the aftermath of the destruction of two World Wars, the United Nations was then - and still is today - envisioned as a global forum for dialogue between nations of the world, to maintain international peace and security, protect human rights, deliver humanitarian aid, promote sustainable development and uphold international law.

Episcopalians have been engaging with the United Nations (UN) since before its inception in 1945. Today, Episcopalians participate in many ways: as UN staff; as representatives of member states, civil society organizations or The Episcopal Church following UN dialogue on global issues that concern them; or as participants in UN events virtually or in person. Specifically, the Episcopal Church was granted in 2014 UN Economic and Social Council special consultative status and was granted in 2017 observer organization status with the UN Framework Convention on Climate Change.

This resolution commends UN initiatives and actions and recommits The Episcopal Church, in collaboration with the Anglican Communion, and other faith-based partners, to active engagement with the United Nations. It urges the United States and member nations to pay fully their assessed financial contributions; craft international agreements, declarations, treaties, and conventions to resolve global concerns; and recognize these actions as multilateral legal instruments that complement, rather than compete with, national laws.

A022 Commend the Work of Episcopal Migration Ministries

Resolved, the House of ____ concurring, That the 80th General Convention commend the work and mission of Episcopal Migration Ministries, specifically its faithful ministry of welcome and love to more than 95,000 refugees through its 40 year-old Resettlement Program and its 80 year-old Church Engagement Program; and be it further

Resolved, That the General Convention reaffirm that The Gospel of Jesus Christ calls us to welcome the stranger and respect the dignity of every human being and that those fleeing persecution have a particular claim on our attention and concern as they seek a life of dignity and peace in the face of oppression; and be it further

Resolved, That the General Convention endorse the continued ministry of Episcopal Migration Ministries in responding to the needs of refugees, even as the number allowed to enter the United States has been greatly reduced in recent years, and working with the Church through the Church Engagement Program to minister to asylum seekers, those in detention, and all migrants.

EXPLANATION

The Episcopal Church has served immigrants new to the United States since the late 1800s, when the Church opened port chaplaincies to minister to sojourners on both coasts. In the 1930s, local parishes collected donations to provide steamship passage for those fleeing Nazi Europe. Out of this effort, the Presiding Bishop's Fund for World Relief was born, the forerunner organization to Episcopal Relief & Development and Episcopal Migration Ministries (EMM). Since the mid- and late 20th century, EMM has partnered with other faith organizations to resettle those oppressed by the Iron Curtain, genocides of Southeast Asia, wars and conflict in Africa and the Middle East. In 1988, EMM was formally established as a resettlement agency and, in partnership with a network of affiliate agencies, dioceses, churches, and volunteers, is today one of only nine national agencies through which all refugees enter the United States.

At baptism, we vow, with God's help, to seek and serve Christ in all persons, loving our neighbor as yourself. In the face of mounting obstacles, the staff of EMM have courageously put that promise into action and continue to lead the way in refugee resettlement and in building ministries of welcome, education, and advocacy across the Church.

The process of deepening relationships with the Church includes discerning together what the ministry opportunities and needs for local churches and dioceses are concerning migration ministries. The EMM Church Engagement unit has led local discernment which has birthed two new vibrant ministry areas in immigration detention and asylum. Consistent with Executive Council

Resolution MBo01 (Oct. 15, 2018), the Standing Commission on World Mission urges the Convention to lift up and commend EMM's faithful ministry and encourage individual and parish collaboration and support through advocacy, personal involvement, and funding.

A023 Direct Inclusion of Asset Mapping Question in the Parochial Report

Resolved, the House of ____ concurring, That the General Convention direct the Executive Officer of General Convention to add to the Parochial Report the following question and instructions for responding affirmatively to capture the diversity of God's mission in the world:

"Have you completed or reviewed your profile of domestic and global mission activities on the Episcopal Asset Map, a joint project of The Episcopal Church and Episcopal Relief & Development?"

EXPLANATION

2018-A058 challenged all congregations to complete their profiles on the Episcopal Asset map. The Episcopal Asset Map is the "Find a Church" and "Find a Ministry" tool of the Episcopal Church. To be effective, the Asset Map requires updating. The Parochial Report provides a tool for reminding congregations to complete or update their profiles as well as promoting the usefulness of the Asset Map in responding to the call to be the hands and feet of Jesus in the world.

The first item of the mandate for the Standing Commission for World Mission (Resolution 2018-A208) is to identify the global mission work carried out by the Domestic and Foreign Missionary Society, dioceses, congregations, and mission organizations throughout the church. This ongoing activity would be more effective and current if parishes noted and updated their global mission engagements on the Episcopal Asset Map.

The identification of global mission engagements also supports the work of the Office of Global Partnerships. Understanding the scope and character of these global mission engagements enables communications among parishes and dioceses with similar ministries and provides useful direction for the Office of Global Partnerships and the Global Episcopal Mission Network to provide resources and support for these relationships.

A024 Create a Task Force on Translation and Interpretation

Resolved, the House of ____ concurring, That the 80th General Convention, pursuant to Joint Rule IX.22, create a Task Force on Translation and Interpretation, whose mandate includes, but is not limited to, (1) development of a working strategy and criteria for determining and prioritizing the types of materials (media releases, resources, reports, etc.) pertaining to church life to be translated and meetings related to governance to be interpreted and into which languages; (2) establishment of criteria for assuring the quality of translations and interpretation, employing dynamic equivalence, and establish procedures and criteria for hiring professional translators and interpreters to assure high-quality translations and interpretations; (3) consultation with non-English speaking dioceses, jurisdictions, and area missions about their needs and priorities for translations and interpretation; and (4) recommendation of funding levels necessary to implement the strategy; and be it further

Resolved, That the task force begin its work no later than January 1, 2023, with the task concluding its work at the conclusion of the 82nd General Convention, unless its mandate is extended by the 82nd Convention; and be it further

Resolved, That the task force report annually to Executive Council and provide an interim report to the 81st General Convention and a final report with recommendations to the 82nd General Convention; and be it further

Resolved, That the membership of this task force be appointed by the Presiding Bishop and the President of the House of Deputies and include up to three Bishops appointed by the Presiding Bishop for five-year terms, with special consideration given to inclusion of Bishops from non-English speaking dioceses and jurisdictions; up to three Clergy and up to three Lay Persons appointed by the President of the House of Deputies for five-year terms, with special consideration given to inclusion of persons from non-English speaking dioceses, jurisdictions, and mission areas; up to two members of the Standing Commission on World Mission (SCWM) appointed by the SCWM; and one member of the Standing Commission on Liturgy and Music (SCLM) appointed by the SCLM; and be it further

Resolved, That the Executive Officer of General Convention appoint a member of the staff from the General Convention Office and the Presiding Bishop appoint a member of staff from the Language Services Department of the Office of Communications to serve as consultants to the task force; and be it further

Resolved, That \$90,000 be budgeted for the implementation of this resolution, of which \$30,000 would be allocated to the first triennium of the task force's work.

EXPLANATION

Previous resolutions of General Convention have called for all official documents, publications, and digital publications produced by the Domestic and Foreign Missionary Society to be issued in Spanish, and French, notably resolutions 2003-C029, 2003-A082, and 2009-B017. These resolutions have not been fully honored for reasons including lack of funds and the difficulty of identifying which documents should be selected for translations into which languages. Failure to translate critical documents and interpret critical meetings adversely impacts both evangelism and full inclusion of non-English speaking members in the life of the Church, including preparation and participation in General Convention.

More recently, the 79th General Convention acknowledged and started to address shortcomings in translation and interpretation. Resolution 2018-A281 acknowledged the need to improve the provision of interpretation and translations at General Convention. The Standing Commission on Liturgy and Music (SCLM) has made significant progress this triennium, pursuant to 2018-A070, with translations of the Book of Common Prayer into Spanish, French, and Haitian Creole. The Church awaits SCLM's plan, pursuant to 2018-C024, for translating *Enriching Our Worship*, the Book of Occasional Services, and other authorized liturgical resources into the "primary languages currently in use in this church."

Translations of the Book of Common Prayer and liturgical materials serve as an important beginning, but do not address the on-going needs for translation and interpretation of materials and meetings in the life and governance of an inclusive, welcoming, international church. Recognizing that it is infeasible to translate everything, the task force must prioritize what is translated and interpreted and in which languages, evaluate the technical expertise required, and request the requisite funding. Translations must employ "dynamic equivalence": a way of stating, in the target language, the same idea present in the original source language. The correspondence is not word-to-word, but from idea-to-idea, expressed in the same words but, if not possible, in similar phrases having a similar meaning in the source language in its cultural context.

Successful development and implementation of a strategy or criteria to routinely identify and prioritize the types of materials most in need of translation as well as meetings requiring interpretation, requires collaboration with the Presiding Bishop's staff in the Office of Communications and the General Convention Office. It is imperative, once the strategy and procedures are developed and ready for implementation, that more funds be made available for the important work of translation and interpretation. Translation and interpretation needs and costs should be assessed in the planning of new initiatives and programs.

A025 Inclusivity in Forms and Information on the Website of The Episcopal Church and Related Organizations

Resolved, the House of ____ concurring, That the 80th General Convention direct The Episcopal Church and urge all agencies, institutions and other organizations connected with it to review and revise their online forms as necessary to ensure functionality for those residing in non-US areas of The Episcopal Church so that forms can be completed with information world-wide, including but not limited to: addresses, telephone numbers, postal codes and country designations, currency abbreviations and credit card numbers to allow non-US standard responses to form fields for members of congregations and others residing outside the United States; and be it further

Resolved, That the Convention direct the Church Center to ensure that all reports, information and interactive material posted on the website of The Episcopal Church include all of its dioceses and jurisdictions, and that they be available and usable by all members of The Episcopal Church, including those outside the United States, and be it further

Resolved, That the Convention direct all those developing materials of any kind for use by the Church to take into account variations required by dioceses, jurisdictions, and church members outside the United States.

EXPLANATION

We are fond of saying The Episcopal Church is an international church. However, members of congregations outside the United States have found it difficult, if not impossible, to complete online forms for such things as Parochial Reports, lists of deputies to General Convention, registration for programs, ordering materials, etc., as the forms do not accommodate input of addresses with foreign postal codes and countries, telephone numbers, credit card numbers, international email domains, accent marks and other information from geographical areas outside the United States. As a result, incomplete or incorrect information is often provided, or it becomes impossible to fill the form or complete the transaction at all.

The Episcopal Church includes a number of jurisdictions (dioceses and the Convocation of Episcopal Churches in Europe) outside the United States, yet in posting information and interactive sites on the website of The Episcopal Church these jurisdictions and their congregations are often excluded in the reporting and/or do not have full access. For example, in publishing the results of the Parochial Reports, information from the non-US jurisdictions is often only partially included, leaving out financial information in particular. Additionally, the mapping demographics of Parochial Report data launched on the TEC website do not even mention the jurisdictions outside the US. Such inclusion

was already requested through Resolution 2009-Co60 “Direct Inclusion of Overseas Congregations in Statistical Reports.”

Many materials developed for use in the Church assume they will be used in the United States by Americans. As a result, some materials are of less use outside the United States. While to a certain degree this is inevitable, those developing materials should be aware that most materials should also be relevant to those outside the United States.

As we seek to build a Beloved Community, this resolution seeks to ensure that all members of The Episcopal Church have full access to information and online forms, and that all reporting and information are fully inclusive. It is vital that the website of The Episcopal Church be inclusive of the entire Church.

A026 Applaud Missionaries and Commend the 20th Anniversary of the Young Adult Service Corps

Resolved, the House of ____ concurring, That the 80th General Convention applaud the flexibility and resilience of members of the Young Adult Service Corps and the Episcopal Volunteers in Mission who, during the difficult times of pandemic, have faithfully continued to respond to God’s call for them, walking the Way of Love as agents and instruments of God’s reconciliation, and seeking and serving Christ in all persons; and be it further

Resolved, That the General Convention commend the 20th Anniversary of the Young Adult Service Corps and the work of the Office of Global Partnerships in the spiritual and vocational formation of program candidates and participants; and be it further

Resolved, That the General Convention give thanks for parishes and dioceses which financially and spiritually support these missionaries during their placements and upon their return home.

EXPLANATION

The Young Adult Service Corps was designed to offer young adults ages 21-30 the opportunity to discern vocations, share their gifts and skills, and be part of the life and work of a community in another part of God’s world. In the last 20 years, 208 young adults from all nine provinces of The Episcopal Church have spent time living, working, and praying alongside Anglican/Episcopal and

ecumenical and interfaith partners throughout the world. Young adults commit to one-year assignments.

Episcopal Volunteers in Mission supports Episcopalians ages 31 to build relationships, share their gifts and skills, listen to and learn from partners around the world, and be open to the personal transformation that comes from meeting God in new ways. This program offers opportunities for shorter-term assignments of several months and longer-term assignments of 1-2 years. It is open to both lay and ordained people in a variety of fields including, but not limited to, education, finance, administration, agriculture, communication, and chaplaincy.

The 2020 coronavirus pandemic created challenges for missionaries in both these programs. Their responses to the realities in and demands of their assignments have demonstrated spiritual maturity and faithfulness in discerning faithful responses to God's call and deep commitment to their ministries. Furthermore, financial and spiritual support from dioceses and parishes are critical for sustaining these missionary efforts.

A027 Support of the World Health Organization

Resolved, the House of ____ concurring, That the 80th General Convention express its full support of the World Health Organization in its mission to promote the highest standard of health for all people; and be it further

Resolved, That the General Convention support the position that the United States of America remain a full member of the Organization; and be it further

Resolved, That the General Convention direct the Office of Government Relations to communicate to the leadership of both Houses of Congress and other appropriate governmental agencies the position of The Episcopal Church regarding the World Health Organization and its concern that the independence of the World Health Organization to pursue its global mission not be compromised by partisan national politics and interference, especially as the world responds to the threat of climate change to world health and the effect of pandemics such as Covid-19 on populations with fragile health care systems.

EXPLANATION

The World Health Organization (WHO) is a specialized agency of the United Nations system with 194 member states. Its primary role is to direct international health within the United Nations' system

and to lead partners in global health responses, directing and coordinating international health work through collaboration with countries, the United Nations system, international organizations, civil society, foundations, academia, and research institutions.

In 2019, the WHO outlined the top ten threats to global health. The dominant threats are global warming and climate change. Strong threats are heart disease, diabetes, and cancer. The WHO also noted the threat of a flu-like pandemic such as Covid-19, although when and where the pandemic would appear could not be predicted. Other threats were vulnerable health care systems and vaccine resistance.

The WHO has led the eradication of smallpox and is instrumental in efforts to control polio, HIV, and tuberculosis. The WHO has improved maternal and child health care worldwide.

In April 2020, the United States suspended financial contributions to the World Health Organization and began procedures to withdraw from the Organization. This resolution seeks to encourage Episcopalians to understand how the World Health Organization exemplifies the healing ministry of Jesus and thus promote the WHO to decision-makers in the United States and throughout all countries of the Episcopal Church as the impact of the WHO affects its global mission partners worldwide.

The Principles of the World Health Organization, stated at the beginning of its Constitution, confirm our baptismal vow to “strive for justice and peace among all people, and respect the dignity of every human being”. As the world-wide intergovernmental health organization, the WHO is the leading agency in promoting health for all. While other organizations, governmental and non-governmental, are involved in healthcare and public health, the role of WHO as the lead intergovernmental organization in health and as part of the UN system is crucial.

A028 Join, Participate, and Fund The Global Episcopal Mission Network

Resolved, the House of ____ concurring, That the 80th General Convention celebrate and commend the Global Episcopal Mission Network (GEMN) and its leadership on 25 years of encouraging global mission within and beyond the Church and equipping and inspiring individuals, congregations, and organizations to engage in this work; and be it further

Resolved, That the General Convention acknowledge GEMN’s collaboration with the Standing Commission on World Mission and the Office of Global Partnerships in Constable Grant funded work

to develop and disseminate a toolkit of online mission formation resources and other programs to promote theologically grounded practices of engagement with the world; and be it further

Resolved, That individuals, congregations, seminaries, mission organizations, dioceses, and jurisdictions be encouraged to support the work of GEMN by becoming members, participating in its conferences and activities, and funding its work; and be it further

Resolved, That \$50,000 be budgeted to support the work of GEMN during the next triennium.

EXPLANATION

GEMN was founded in 1995 as a network of dioceses who sought to promote the global mission work of the Church and collaborate around best practices in global mission. Over the years, the network expanded to include individuals, congregations, seminaries, and mission organizations. Recent GEMN Conferences have focused on Episcopal Church mission priorities of evangelism, reconciliation, and care for creation. During this past triennium, GEMN worked closely with SCWM and with the Office of Global Partnerships (OGP) to develop a digital Global Mission Toolkit to further the work of mission formation. GEMN also transitioned its Mission Formation Program and other mission education to online formats.

Recent world events - such as the Covid-19 pandemic, the climate crisis, and increasing human migration - highlight the importance of working together as God's people in mission across national boundaries. As an integral partner with OGP and SCWM, GEMN plays a crucial role in The Episcopal Church by building and strengthening networks of Episcopalians engaged in global mission. GEMN intends to continue collaboration with SCWM and OGP in the coming triennium to promote and share the Guiding Principles for World Mission and the Global Mission Digital Toolkit as well as offer online and in-person mission conferences and formation for Global Mission Advocates.

This resolution calls for support for GEMN from both voluntary memberships and from the triennium budget to create a more stable financial base for shared networking around global mission. It also encourages participation in GEMN activities to help Episcopalians think and imagine a world where Love is the Way.

A029 Support for Military Chaplains

Resolved, the House of ____ concurring, That the 80th General Convention commends the ministry of The Episcopal Church's military chaplains, who bravely tend to the spiritual and religious needs of United States Armed Forces service members as pastors, priests and preachers; and be it further

Resolved, That the Bishop Suffragan for Armed Forces and Federal Ministries, in addition to tending to chaplains serving in federal prisons and hospitals, continue to uphold The Episcopal Church's leadership role in forming and supporting military chaplains to respond to the challenges facing today's military personnel, including extended exposure to violence, injustice, hatred and hardship; and be it further

Resolved, That the General Convention affirms the 2001 "Declaration of the Episcopal Church's Understanding of Ministry to the Armed Forces", including Episcopal military chaplains' commitment to love and serve members of all faith groups, and to ensure access to the free exercise of religion within the constraints of military service; and be it further

Resolved, That Congregations engage with military chaplains so as to learn from their experience with global mission and interreligious dialogue, and from their example as an embedded servant ministry proclaiming and portraying the Gospel beyond the church; and be it further

Resolved, That the Standing Commission on World Mission collaborate with the the Standing Commission on Liturgy and Music to choose an appropriate day for observance of the Church's military chaplains, and consider developing a collect and suggested lectionary for observance of Military Chaplains Day for authorization by the 81st General Convention.

EXPLANATION

Approximately 150 ordained Episcopal ministers currently serve as military chaplains and commissioned officers in all branches of the U.S. Armed Forces, both active duty and reserves, as well as with the National Guard, Coast Guard Auxiliary, Civil Air Patrol, State Defense Forces (Georgia) and Veterans Administration hospitals. The Bishop Suffragan for Armed Forces and Federal Ministries tends to these military chaplains, as well as to chaplains serving in federal penitentiaries.

Many Episcopalians may not be aware of this important ministry of the church, which dates to the Revolutionary War when General George Washington appointed Episcopal priest John Hurt as the nation's first Army chaplain. Rev. Hurt was ordained on December 21, 1774; this date, signifying the Episcopal Church's unique longstanding leadership role within the U.S. military chaplain corps, is one

option the Standing Commission on Liturgy and Music may consider in responding to the final Resolved of this Resolution calling for a day of observance.

In January 2001, the Bishop Suffragan for Armed Forces and Federal Ministries and twelve serving chaplains composed a statement of understanding of Episcopal Church ministry within the military context. This “Declaration of the Episcopal Church’s Understanding of Ministry to the Armed Forces” is referenced and affirmed in this Resolution, and is copied in full below. The purpose of the statement was to clarify the parameters of the role of Episcopal Church chaplains; chaplains are currently urged to utilize it when interpreting to new commanders and supervisory chaplains their role as priests serving in the uniformed service.

In bringing forward the ministry of military chaplains and the Bishop Suffragan, the Standing Commission on World Mission intends to highlight in particular their contribution to the church’s global mission, including enhancing interreligious understanding and ministering to service members deployed overseas.

Declaration of the Episcopal Church’s Understanding of Ministry to the Armed Forces:

Clergy of the Episcopal Church are ordained to fill the roles of pastor, teacher and priest. The Episcopal Church expects its chaplains to fulfill those roles in as broad and inclusive a manner as possible while remaining faithful to the church’s historical, theological and liturgical roots in both Roman Catholicism and the English Reformation.

As pastors, Episcopal military chaplains love and serve all of the people among whom we work. We preach and teach the faith of the church in Protestant and other services as opportunity permits, remaining flexible in form yet consistent in upholding the traditions of the Episcopal Church. Caring for all and committed to the free exercise of religion by all we cooperate with chaplains of all faith groups to ensure access for the free exercise of religion and religious accommodation within the constraints of military service. In this way, we try to feed those of God’s people whose spirituality, theology, or liturgical practice diverges from ours.

For Episcopalians, the Eucharist is the central act of worship. All baptized persons are welcome to join us in this sacred mystery. We gather in community to be nourished in Word and Sacrament. The Bible, reason, and tradition inform and shape the Eucharist through which we have communion with our Lord and by which we are invigorated for mission.

Present divisions in the body of Christ cause us much pain. We look for the day when all are one in Christ. Until then, we live with those divisions and the unavoidable, resulting constraints.

Sacramentally, Episcopal chaplains can only function in accordance with the Book of Common Prayer, the Canons of the Episcopal Church and the guidance of the Episcopal Bishop. Only clergy from churches in communion with the Church of England can conduct Episcopal services.

We, the undersigned Priests and Bishop of the Episcopal Church who minister to the Armed Forces, are thankful for the ministry entrusted to us and ever mindful of our need for God's grace and mercy for ourselves and with those to whom we minister in this challenging, pluralistic environment.

Washington National Cathedral, Feast of the Confession of St. Peter the Apostle, In the Year of our Lord 2001

Composed and signed by Bishop George E. Packard, Chaplains Carl M. Andrews, Gerald J. Blackburn, Dedre Ann Bell, S. Michael Bell, George M. Clifford III, Robert W. Eldridge, Reese M. Hutcheson, Roger D. Kappel, James B. Magness, Richard D. Oberheide, Gary L. Parker, and Malcolm Roberts III.

A030 Task Force on Pacifism and Just War

Resolved, the House of ____ concurring, That the 80th General Convention authorize the establishment of a Task Force on Pacifism and Just War to deepen understanding of the Church's pacifist and just war traditions, including the Anglican Communion's distinctive contributions to these traditions, among military chaplains, missionaries, seminarians, clergy, congregations, and others engaged in the Church's global mission, for application to contemporary war, peace and human rights issues; and be it further

Resolved, That the Task Force draw upon the experience and expertise garnered from the Military Chaplains Just War Education Project funded through the 2020-21 Constable Grant program to prepare a report recommending educational programs, public policy positions, and outreach initiatives consistent with the Task Force's mandate for consideration by the 81st General Convention; and be it further

Resolved, That this Task Force be appointed jointly by the President of the House of Deputies and the Presiding Bishop, in consultation with the Standing Commission on World Mission, and consist of three bishops, three priests or deacons, and six laypersons from a diverse representation of the Church, and include military chaplains and those living in jurisdictions outside the United States; and be it further

Resolved, that \$5,000 be budgeted for work of the Task Force over the next triennium.

EXPLANATION

Despite several Resolutions adopted by General Convention over time, awareness and understanding of The Episcopal Church's approach to the morality and ethics of warfare, informed by both historic pacifist and just war traditions, remains incomplete. Enhancing educational opportunities and training for the Church's military chaplains on these matters was the intent of the Military Chaplains Just War Education Project proposed by the Standing Commission on World Mission and awarded a Constable Grant by Executive Council in June 2020. This Resolution anticipates the completion of this project in 2021 and seeks to establish a Task Force that can build upon its work to potentially broaden its practical application to the wider Church, respecting the diversity of perspectives on war and peace among Episcopalians while also appreciating the continued calling of the Church to find its prophetic voice on these perennial issues.

Monies budgeted for the Task Force in the Resolution are intended to defray any modest expenses for translation, travel or meeting arrangements to facilitate completion of the Task Force's work. It is envisioned that the Task Force would rely primarily on virtual meeting technological solutions where possible to minimize these expenses.

Continuance recommendation

After being disbanded for 2015 to 2018, the Standing Commission on World Mission was reorganized for this triennium. We recommend that this Commission continue to operate in the next triennium in order to:

- Promote the Guiding Principles for World Mission, the Message to the Church, and the use of the Global Mission Digital Toolkit; seek feedback about these resources; and monitor their use and impact
- Research and draft a report on how the Episcopal Church participated in colonialism and identify some of the ways a colonial mindset continues to affect mission relationships
- Continue work begun in this triennium to advocate for theological education on World Mission and promote development of courses for Anglican studies for jurisdictions outside the United States
- Review and monitor adherence to previous commitments made by The Episcopal Church to provide translations of materials into languages other than English for use by The Episcopal Church
- Monitor use of the Episcopal Asset Map
- Continue collaboration with mission partners such as OGP, GEMN, and mission agencies to carry out Episcopal Church mission priorities and strengthen The Episcopal Church's witness around the world

STANDING COMMISSION ON LITURGY AND MUSIC

Membership

The Rev. Paul Fromberg, <i>Chair</i>	California, VIII	2021
Mrs. Ellen Johnston, <i>Vice-Chair</i>	Virginia, III	2021
The Rev. Stannard Baker, <i>Secretary</i>	Vermont, I	2024
Mr. Thomas Alexander	Arkansas, VII	2021
The Rev. Susan Anslow Williams	Michigan, V	2021
Dr. Michael Boney	Colorado, VI	2024
Ms. Martha Burford	Southwestern Virginia, III	2021
Canon Mark Childers	Rio Grande, VII	2024
Mr. Joshua Floberg	North Dakota, VI	2024
The Rev. Canon Robert Hino	Hawaii, VIII	2024
The Rt. Rev. Jeffrey Lee	Chicago, V	2021
Mr. Ellis Montes	Texas, VII	2024
Ms. Jessica Nelson	Mississippi, IV	2021
Mr. John Robert	Western Louisiana, VII	2021
Br. Angel Roque, BSG	Southeast Florida, IV	2024
The Very Rev. Dr. James Turrell	Bethlehem, III	2021
The Rt. Rev. Andrew Waldo	Upper South Carolina, IV	2024
The Rt. Rev. Pierre Whalon	Convocation of Episcopal Churches in Europe, II	2024
The Rt. Rev. Terry White	Kentucky, IV	2021
The Rt. Rev. Carl Wright	Washington, III	2024
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Ms. Athena Hahn (Member) 2019
 Ms. Mary Grace DuPree (Member) 2019
 The Rev. J. Sierra Reyes (Member) 2019
 The Rev. Canon Frank Logue (Liaison of Executive Council) 2019

Acknowledgements

The Rev. Clayton Crawley (Church Publishing Liaison)

Mandate

Canon I.1.2.n.2

2. A Standing Commission on Liturgy and Music. The Custodian of the Book of Common Prayer shall be a member *ex officio* with voice, but without vote. It shall be the duty of the Commission to:

- i. Discharge such duties as shall be assigned to it by the General Convention as to policies and strategies concerning the common worship of this Church.
- ii. Collect, collate, and catalogue material bearing upon possible future revisions of the Book of Common Prayer.
- iii. Cause to be prepared and to present to the General Convention recommendations concerning the Lectionary, Psalter, and offices for special occasions as authorized or directed by the General Convention or House of Bishops.
- iv. Recommend to the General Convention authorized translations of the Holy Scripture from which the Lessons prescribed in the Book of Common Prayer are to be read.
- v. Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.
- vi. Collect, collate, and catalogue material bearing upon possible future revisions of The Hymnal 1982 and other musical publications regularly in use in this Church, and encourage the composition of new musical materials.
- vii. Cause to be prepared and present to the General Convention recommendations concerning the musical settings of liturgical texts and rubrics, and norms as to liturgical music and the manner of its rendition.
- viii. At the direction of the General Convention, to serve the Church in matters pertaining to policies and strategies concerning Church music.
- ix. Collaborate with the Secretary of General Convention to make final edits to the text of resolutions adopted by General Convention that establish new or revised liturgical materials, and to arrange for their publication. For the sole purpose of this collaboration, members of the Standing Commission on Liturgy and Music are exempt from the terms of office set forth in I.1.2.b and shall remain in office until their successors are appointed and take office.

Summary of Work

The Standing Commission on Liturgy and Music's work in the 2018 - 2021 triennium was primarily responding to resolutions from the 79th General Convention. However, many of those resolutions returned us to work from the previous triennium, including revisions for *The Book of Occasional Services* and *Lesser Feasts and Fasts*. Significantly, the SCLM was not asked to directly take up the work which had occupied our attention in the last triennium, the question of comprehensive Prayer Book revision. As is reported in another place in this volume, General Convention assigned that work to the Task Force of Liturgical and Prayer Book Revision, which admirably discharged it. The SCLM is grateful for the excellent work of the Task Force.

A significant portion of our work took place under the exceptional circumstances of 2019 – 2020, including the COVID-19 pandemic and the United States' most recent awakening to the issues of racism and white supremacy, which continue to vex Episcopalians. All of these forces influenced both the content of our work and the processes by which we accomplished it.

At the beginning of the triennium, we decided that the best course forward was to divide the twenty-eight resolutions we received from General Convention into seven sub-committees. The summary of our work consists of reports from the seven sub-committees of the SCLM:

- Subcommittee on The Book of Occasional Services
- Subcommittee on the Calendar of the Church
- Subcommittee on Policy and Evaluation
- Subcommittee on Formation
- Subcommittee on The Book of Common Prayer
- Subcommittee for Liturgical Translation
- Subcommittee on Constitution and Canons

In each of these subcommittees, members of the SCLM and others we invited into the work as consultants addressed the resolutions thoughtfully and with an eye on the church's life together post-pandemic. The values that guided our work centered on our service to God's mission in the world and how we could empower members of the church to take up this mission through liturgical texts, guidelines, formation, and worship.

We have been keenly aware that the most significant influence in the church's liturgy should come up from worshipping communities to the General Convention, and not the other way around. This awareness means that we look to enculturated expressions of worship to guide us in developing liturgical resources. Instead of assuming that we know what the church needs to revitalize its life in worship, we have asked the church to tell us what they are doing already and share it with the broader community.

We wish to express our gratitude to the General Convention Office staff – for their incredible patience and generous assistance throughout the triennium. We are grateful, too, to the Presiding

Officers for offering each of us the opportunity to serve our beloved church, and we look forward to the deliberations of the 80th General Convention.

Speaking as the Chair of the SCLM, I wish to thank each member and consultant for their dedication, wisdom, insight, and creative energy in accomplishing the work the church has given us to do.

Respectfully Submitted,
The Rev. Paul D. Fromberg, D.Min
Chair, The Standing Commission on Liturgy and Music

Budget

The SCLM requests the sum of \$200,000 to complete the translation of liturgical texts as mandated by General Convention.

Supplementary Material

The supplementary materials provided by each subcommittee were appended to their own report.

Proposed resolutions

A005 Translations of Enriching Our Worship and the Book of Occasional Services into Spanish, French, and Haitian Kreyol

Resolved, the House of ____ concurring, That this 80th General Convention directs the Standing Commission on Liturgy and Music to facilitate the professional translation of *Enriching Our Worship*, Volumes 1 – 6 and *The Book of Occasional Services 2018*, and *Lesser Feasts and Fasts* into Spanish, French, and Haitian Kreyol; and be it further

Resolved, that in this work the Standing Commission on Liturgy and Music's Task Force for Liturgical Translations, employ the same process and criteria used for the new translation of the Book of Common Prayer into these languages; and be it further

Resolved, that the sum of \$200,000 be appropriated to the Standing Commission on Liturgy and Music for the completion of these translations.

EXPLANATION

The work of liturgical translation needs to continue as the SCLM responds to the call of the 79th General Convention in Resolution 2018-Co24: "Resolved, That the Standing Commission on Liturgy and Music be directed to consider and propose to the 80th General Convention a process for translating *Enriching Our Worship*, *Book of Occasional Services*, and other authorized liturgical resources into the primary languages currently in use in this church."

The amount requested is commensurate with the amount of work required for professionally translating these texts into the official languages of the Episcopal Church.

A006 Authorize the Book of Occasional Services, 2021

Resolved, the House of ____ concurring, That the 80th General Convention authorize for optional use throughout this Church A Scriptural Way of the Cross; On Maundy Thursday; When Persons Leave a Congregation; Presentación de un(a) Niño o Niña (Presentation of a Child); Quinceañera (The Celebration of Fifteen Years); The Founding of a Church: Ground Breaking; The Founding of a Church: Laying of a Cornerstone; Commissioning a Church Planter, Missioner, or Mission Team; A Liturgy for the Opening of a New Congregation; Setting Apart Secular Space for Sacred Use; A Litany of God's Mission for the Church; Consecration of Chrism Apart from Baptism; Reaffirmation of Ordination Vows, Reception as a Priest or Deacon, and Restoration to the Ordained Ministry; and be it further

Resolved, that the 80th General Convention authorize the publication of the revision of that certain document entitled *The Book of Occasional Services*, prepared by the Standing Commission on Liturgy and Music and published by The Church Hymnal Corporation in 1979, and last revised in 2018.

EXPLANATION

The Book of Occasional Services, 2018 was presented by the Standing Commission on Liturgy and Music to the 79th General Convention as Resolution 2018-A218. Portions of *The BOS 2018* were referred back to the SCLM for further revision, requesting that the SCLM report on this work to the 80th General Convention. Portions of this volume were made digitally available to the church for use in the 2018-2021 triennium.

Additionally, Resolution 2018-A283 directed the SCLM to collaborate with the Department of Ethnic Ministries to provide liturgies for additional pastoral rites, including but not limited to Quinceañera and Presentación, to be authorized for use in The Episcopal Church.

Finally, in Resolution 2018-C024, the 79th General Convention directed that *The BOS 2018* be translated into the primary languages currently in use in this church.

The copy of *The Book of Occasional Services 2021*, presented as Supplementary Material to the report to the 80th General Convention of the Standing Commission on Liturgy and Music (otherwise known as the "blue book" report), is offered in response to these directions of General Convention.

A007 Authorize Lesser Feasts and Fasts 2018

Resolved, the House of ____ concurring, That the volume *Lesser Feasts and Fasts 2018*, with revisions approved at this 80th General Convention, be authorized for use throughout the Church. Commemorations shall be listed using the most accurate dates. On dates when multiple observances result, they shall appear with the earlier observance listed first.

EXPLANATION

Lesser Feasts and Fasts, 2018 was presented by the Standing Commission on Liturgy and Music to the 79th General Convention as Resolution 2018-A065. In this Resolution, the 79th General Convention authorized the volume *Lesser Feasts and Fasts, 2006* with the additions of the new commemorations in *LFF 2018* to be authorized for trial use and be included in the calendar for the 2018-2021 triennium.

The volume *Great Cloud of Witnesses 2015* was not authorized but was made available for the 2018-2021 triennium.

Additionally, the 79th General Convention charged the SCLM to provide a clear and unambiguous plan for a singular calendar of Lesser Feasts and Fasts.

The document "Proposed Calendar of the Church, Including Lesser Feasts and Fasts 2018 _ 2021", which is presented as Supplementary Material in the report to the 80th General Convention of the Standing Commission on Liturgy and Music Subcommittee on the Calendar (otherwise known as their "blue book" report) is offered in response to these directions of General Convention.

Aoo8 Additional Calendar Commemorations

Resolved, the House of ____ concurring, That commemorations of Simeon Bachos the Ethiopian Eunuch (August 27), Episcopal Deaconesses (September 22), and Frederick Howden, Jr (December 11) be authorized for trial use for the triennium 2021-2024.

EXPLANATION

During the 79th General Convention several proposed commemorations were presented to the Standing Commission on Liturgy and Music for possible inclusion in *Lesser Feasts and Fasts 2018*. Additional proposed resolutions were received by the SCLM in the course of the 2018-2021 triennium.

Of the eleven commemorations proposed, the three listed were deemed in compliance with criteria for commemorations in the revised "Principles of Revision" approved by resolution 2009-A098.

These commemorations are proposed for inclusion in *Lesser Feasts and Fasts 2018*. Biographies for the three proposed new commemorations can be found in the supplemental materials of the report to the 80th General Convention of the Standing Commission on Liturgy and Music's Calendar subcommittee.

Aoo9 Revision of Existing Calendar Commemorations

Resolved, the House of ____ concurring, That the biographical materials on Absalom Jones (February 13) shall be revised as follows:

Absalom Jones, Priest, 1818

Absalom Jones was born enslaved to Abraham Wynkoop, a wealthy Anglican planter in 1746 in Delaware. He was working in the fields when Abraham recognized that he was an intelligent child and ordered that he be trained to work in the house. Absalom eagerly accepted instruction in reading. He also saved money he was given and bought books (among them a primer, a spelling book, and a bible). Abraham Wynkoop died in 1753, and by 1755 his younger son Benjamin had inherited the plantation. When Absalom was sixteen, Benjamin Wynkoop sold the plantation and Absalom's mother, sister, and five brothers. Wynkoop brought Absalom to Philadelphia, where he opened a store and joined St. Peter's Church. In Philadelphia, Benjamin Wynkoop permitted Absalom to attend a night school for black people operated by Quakers following the tradition established by abolitionist teacher Anthony Benezet.

At twenty, with the permission of their masters, Absalom married Mary Thomas, who was enslaved to Sarah King, who also worshipped at St. Peter's. The Rev. Jacob Duche performed the wedding at Christ Church. Absalom and his father-in-law, John Thomas, used their savings and sought donations and loans primarily from prominent Quakers, in order to purchase Mary's freedom. Absalom and Mary worked very hard to repay the money borrowed to buy her freedom. They saved enough money to purchase property and to buy Absalom's freedom. Although he repeatedly asked Benjamin Wynkoop to allow him to buy his freedom, Wynkoop refused. Absalom persisted because as long as he was enslaved, Wynkoop could take his property and his

money. Finally, in 1784 Benjamin Wynkoop freed Absalom by granting him a manumission. Absalom continued to work in Wynkoop's store as a paid employee.

Absalom left St. Peter's Church and began worshipping at St. George's Methodist Episcopal Church. He met Richard Allen, who had been engaged to preach at St. George's, and the two became lifelong friends. Together, in 1787, they founded the Free African Society, a mutual aid benevolent organization that was the first of its kind organized by and for black people. Members of the Society paid monthly dues for the benefit of those in need. At St. George's, Absalom and Richard served as lay ministers for the black membership. The active evangelism of Jones and Allen significantly increased black membership at St. George's. The black members worked hard to raise money to build an upstairs gallery intended to enlarge the church. The church leadership decided to segregate the black worshippers in the gallery without notifying them. During a Sunday morning service, a dispute arose over the seats black members had been instructed to take in the gallery. The ushers attempted to physically remove them by first accosting Absalom Jones. Most of the black members present indignantly walked out of St. George's in a body.

Prior to the incident at St. George's, the Free African Society had initiated religious services. Some of these services were presided over by The Rev. Joseph Pilmore, an assistant at St. Paul's Episcopal Church. The Society established communication with similar black groups in other cities. In 1792 the Society began to build the African Church of Philadelphia. The church membership took a denominational vote and decided to affiliate with the Episcopal Church. Richard Allen withdrew from the effort as he favored affiliation with the Methodist Church. Absalom Jones was asked to provide pastoral leadership, and after prayer and reflection, he accepted the call.

The African Church was dedicated on July 17, 1794. The Rev. Dr. Samuel Magaw, rector St. Paul's Church, preached the dedicatory address. Dr. Magaw was assisted at the service by The Rev. James Abercrombie, assistant minister at Christ Church. Soon thereafter, the congregation applied for membership in the Episcopal Diocese of Pennsylvania on the following conditions: 1) that they would be received as an organized body; 2) that they would have control over their local affairs; 3) that Absalom Jones would be licensed as lay reader, and, if qualified, be ordained as a minister. In October 1794, it was admitted as the African Episcopal Church of St. Thomas. The church was incorporated under the laws of the Commonwealth of Pennsylvania in 1796. Bishop William White ordained Jones as deacon in 1795 and as priest on September 21, 1802.

Jones was an earnest preacher. He denounced slavery and warned the oppressors to "clean their hands of slaves." To him, God was the Father, who always acted on "behalf of the oppressed and distressed." But it was his constant visiting and mild manner that made him beloved by his congregation and by the community. St. Thomas Church grew to over 500 members during its first year. The congregants formed a day school and were active in moral uplift, self-empowerment, and anti-slavery activities. Known as "the Black Bishop of the Episcopal Church," Jones was an example of persistent faith in God and in the Church as God's instrument. Jones died on this day in 1818.

and be it further

Resolved, That the commemoration of Maryam of Qidun (October 29) be revised as follows:

Maryam of Qidun, Monastic, 4th century

Maryam of Qidun is one of the most popular Syriac Christian saints. The drama of her life story easily lends itself to fictionalized interpretations, and multiple accounts of her life were produced. There nevertheless does seem to be a historical person in the background of all of these accounts, who became the inspiration for all of these legends.

Maryam grew up in a Christian family and was orphaned at the age of seven. Her only living relative was an uncle named Abraham who lived as a hermit in the desert near Qidun, a village outside of Edessa. Despite the seeming oddity of an anchorite serving as the guardian for a young girl, therefore, she was given to him to raise. For twenty years, she lived an ascetic life in her own room in his dwelling, growing deeply in holiness and prayer, teaching those who came to seek her wisdom through a window, and being praised and admired by all who met her.

However, there was a monk who desired her, and who used to come to the hermitage every day on the pretext of speaking with Abraham in order to see her. One day, when Maryam's uncle was away, the monk raped her. Maryam fell into despair about the possibility of her salvation, for she had always been admired for her purity and holiness. Deeply shaken, she questioned, "How can I ever again raise my eyes up to heaven when I cannot even bring myself to look at my uncle?" Rather than face him and confess to him what she believed to be a sin, she ran away to the city, trapped by societal judgment and working as a prostitute in a tavern.

After two years of frantic searching, her uncle discovered where she was living, and he borrowed a soldier's uniform and a horse. He covered his face with the helm and set off for the tavern. When he saw her dressed as a prostitute and flirting with the customers he nearly wept, but he concealed his emotions lest she recognize him and run away. Although he had not touched wine or cooked food in nearly fifty years, he feasted and drank and joked as though he were truly a soldier. But when the girl led him back to her bedroom he took off his helm and said, "My daughter Maryam, don't you know me? Whatever has happened to you? Why did you not just tell me when you had sinned? I would not have been angry with you, for who is without sin, except for God alone? I would have done penance for you myself, yet instead you have left me all alone in unspeakable sadness and grief."

As he spoke these words, she was motionless like a stone, too ashamed and afraid to speak or even to raise her eyes to his. But he spoke words of comfort and compassion to her all night, and in the morning, she allowed him to lead her home.

In one way, Maryam's story demonstrates that, regardless of how she first perceived the value of her virginity, God's grace proved to be far wider than she imagined. And in another way, Maryam's story demonstrates that "neither death, nor life... nor things present, nor things to come... nor anything else in all creation," including the evils that ensnared her and defamed her, could separate her from "the love of God in Christ Jesus our Lord."

Collects

I. O God of holiness and strength, rescue us from the sins that ensnare us and destroy the evils that defame us, that, like thy servant Maryam of Qidun, we may find our own selves inseparable

from thy love made known in Christ Jesus our Lord; who with thee and the Holy Ghost liveth and reigneth, one God, in glory everlasting. Amen.

II. O God of holiness and strength, rescue us from the sins that ensnare us and destroy the evils that defame us, that, like your servant Maryam of Qidun, we may find our own selves inseparable from your love made known in Christ Jesus our Lord; who with you and the Holy Spirit lives and reigns, one God, in glory everlasting. Amen.

Lessons and Psalm

Romans 8:31-39

Psalm 31:15-24

John 8:1-11

Preface of Holy Week

And be it further

Resolved, That the commemoration of The Martyrs of Japan (February 5) be revised as follows:

The Martyrs of Japan, 1597

The introduction of Christianity into Japan in the sixteenth century, first by the Jesuits under Francis Xavier, and then by the Franciscans, has left records of heroism and self-sacrifice in the annals of Christian witness. It has been estimated that by the end of that century there were about 300,000 baptized believers in Japan.

Unfortunately, these initial successes were compromised by rivalries among the religious orders, and the interplay of colonial politics, both within Japan and between Japan and the Spanish and Portuguese, aroused suspicion about Western intentions of conquest. After a period of ambiguous support by shoguns Nobunaga and Hideyoshi in the last half of the century, the Christian enterprise began to suffer cruel persecution and suppression, culminating in nationwide edicts banning Christianity under the Tokugawa shogunate at the beginning of the Edo era in 1603.

The first victims were six Franciscan friars and twenty of their converts, who were crucified at Nagasaki, February 5, 1597. In his powerful novel *Silence*, based on the event, Shusaku Endo writes:

“They were martyred. But what a martyrdom! I had long read about martyrdom in the lives of the saints—how the souls of the martyrs had gone home to Heaven, how they had been filled with glory in Paradise, how the angels had blown trumpets. This was the splendid martyrdom I had often seen in my dreams. But the martyrdom of the Japanese Christians I now describe to you was no such glorious thing. What a miserable and painful business it was! The rain falls unceasingly on the sea. And the sea which killed them surges on uncannily—in silence.”

By 1630, what was left of Christianity in Japan was driven underground. Yet it is remarkable that two hundred and fifty years later there were found many men and women, without priests or sacraments, who had preserved through the generations a vestige of Christian faith.

And be it further

Resolved, That the 80th General Convention authorize the deletion of William Porcher DuBose from the Calendar of the Church and liturgical propers set forth in *Lesser Feasts and Fasts, 2018*.

EXPLANATION

During the 2018-2021 triennium, information was made available to the Standing Commission on Liturgy and Music which impressed on the Commission the necessity of revising certain portions of *Lesser Feasts and Fasts 2018*.

These revisions are proposed for authorization in the volume *Lesser Feasts and Fasts 2018*.

A010 Lesser Feasts and Fasts Revision Principles

Resolved, the House of ____ concurring, That the following Principles of Revision be approved by the 80th General Convention and substituted for the previous Principles most recently affirmed by the 76th Convention (2009) and published in *Holy Women, Holy Men*.

Principle of Revision

The qualifications and benchmarks for inclusion in the church calendar are as follows.

1. **Historicity:** Christianity is a radically historical religion, so in almost every instance it is not theological realities or spiritual movements but exemplary witness to the Gospel of Christ in lives actually lived that is commemorated in the Calendar.
2. **Christian Discipleship:** The death of the saints, precious in God's sight, is the ultimate witness to the power of the Resurrection. What is being commemorated, therefore, is the completion in death of a particular Christian's living out of the promises of baptism. Baptism is, therefore, a necessary prerequisite for inclusion in the Calendar.
3. **Significance:** Those commemorated should have been in their lifetime extraordinary, even heroic servants of God and God's people for the sake, and after the example, of Jesus Christ. They may also be people whose creative work or whose manner of life has glorified God, enriched the life of the Church, or led others to a deeper understanding of God. In their varied ways, those commemorated have revealed Christ's presence in, and Lordship over, all of history; and continue to inspire us as we carry forward God's mission in the world. Commemoration thereby reminds us of our participation in the great cloud of witnesses: our

own membership in a timeless community that surrounds and supports us, equipping us for ministry in the world, and moving us toward maturity in Christ.

4. **Memorability:** The Calendar should include those who, through their devotion to Christ and their joyful and loving participation in the community of the faithful, deserve to be remembered by the Episcopal Church today. However, in order to celebrate the whole history of salvation, it is important also to include those “whose memory may have faded in the shifting fashions of public concern, but whose witness is deemed important to the life and mission of the Church” (Thomas Talley).
5. **Range of Inclusion:** The Calendar especially includes Episcopalians and other members of the Anglican Communion. Focusing above all on principles of Christian witness and discipleship, and honoring the movement of the Holy Spirit in the establishment of local observance, the Calendar seeks to represent the full breadth and depth of the Body of Christ.
6. **Local, Organic Observance:** Similarly, it should be the case that significant commemoration of a particular person already exists at the local and regional levels before that person is included in the Calendar.
7. **Perspective:** It should normatively be the case that a person be included in the Calendar only after two generations or fifty years have elapsed since that person's death. The passage of time permits the testing and flowering of their Christian witness.
8. **Levels of Commemoration:** Principal Feasts, Sundays and Major Holy Days have primacy of place in the Church's liturgical observance. It does not seem appropriate to distinguish between the various other commemorations by regarding some as having either a greater or a lesser claim on our observance of them. Each commemoration should be given equal weight as far as the provision of the liturgical propers is concerned (including the listing of three lessons).
9. **Distribution of Commemorations:** Normally, joint commemoration will arise through shared Christian witness or date of death. In some cases, unrelated commemorations will occur on the same date. In the observance of lesser feasts, the preference of the local community may be exercised.

EXPLANATION

The Principles of Revision of the Calendar (aka Criteria for calendar inclusion) were last revised by the SCLM in 2015 and passed by the 78th General Convention (2015-A056). Within the work of the Calendar Committee, further clarification of the Principles was done, and the SCLM presents this revision within the context of ongoing requests to add commemorations to the Calendar, many of which do not meet the criteria. We hope that individuals and dioceses will use these Principles when deciding whether to propose their revision.

A011 Develop Local Commemorations

Resolved, the House of ____ concurring, That the 80th General Convention affirm the following process and guiding questions for developing and nurturing local commemorations; and be it further

Resolved, that this process shall be included in the Appendices to *Lesser Feasts and Fasts 2018*.

Crafting Liturgical Commemorations

History demonstrates that liturgical commemorations originate in the local community. Indeed, all proposed additions to the Calendar of the Church ought to begin as local commemorations. Included below is a process for developing such local observances, as well as some guiding questions that might help the local community through the process.

The Book of Common Prayer (pp. 13, 18, 195, and 246) permits memorials not listed in the Calendar, provides collects and readings for them (the Common of Saints), and recognizes the bishop's authority to set forth devotions for occasions for which no prayer or service has been provided by the Prayer Book. Although the Prayer Book does not require the bishop's permission to use the Common of Saints for memorials not included in the Calendar, it is appropriate that the bishop's consent be requested.

While these guidelines are general in nature, and not exhaustive in scope or situation, this process is suggested for initiating local, diocesan, or regional memorials.

1. Establishment: A congregation, diocese, other community or organization establishes a commemoration for a specific person/occasion, on a specific day.
 - Who/what is being commemorated? Why is this commemoration beneficial to the local community's liturgical life? What would be lost if the commemoration were not observed? (See the most recent set of criteria for inclusion in the Calendar of the Church; and the set of Holy Days, BCP p. 16, that take precedence on their dates.)
2. Collects and Readings: A collect and readings from the Common of Saints are chosen and used. Perhaps a new collect may be composed, and a new collection of readings assigned for use in the commemoration. The Standing Commission on Liturgy and Music and local diocesan liturgical bodies are available for consultation.
 - How might selections from Holy Scripture and the chosen, or new, collect communicate the reason for observing the commemoration? What selections of Holy Scripture will help the congregation to better understand the commemoration? What do we need to pray for in the collect to better understand the commemoration?
3. Observance: The congregation, diocese, province, or organization proceeds to annually observe the commemoration in their regular liturgical life.
 - How might you invite others to join the celebration? Does it make sense to invite the local community? Nearby congregations? The diocese? The province?

4. Evaluation: The local community should engage in ongoing evaluation of the commemoration. The evaluation should include conversation with members of the community and with participants in the observance. Earlier steps should be revisited if necessary.

- How has your thinking in previous steps evolved through your observance of the commemoration? What have you learned? What feedback have you received? What has surprised you as you've observed the commemoration? To what extent has the local community embraced the observance? Does anything need to change? How might the readings and collect need to be adapted?

5. Wider Recognition: Those interested in promoting a wider commemoration then begin to share the developed materials with others, suggesting that they also adopt the commemoration. If at some time it is desired to propose it for optional observance by the wider Church, documented evidence of the spread and duration of local commemoration is essential to include in the proposal to the General Convention.

- Why should the commemoration be observed by the wider Church? What would the wider Church lose if it did not observe this commemoration? How would this commemoration strengthen or balance the Calendar of the Church? (See the most recent set of criteria for inclusion in the Calendar of the Church.)

Some commemorations, perhaps many, will remain local, diocesan, or regional in character. This in no way reduces their importance to those who revere and seek to keep alive the memory of beloved and faithful witnesses to Christ. Regardless of local or Church-wide use, The Book of Common Prayer welcomes regular, local commemorations in the liturgical life of the Church.

EXPLANATION

The earliest, liturgical recognition of an extraordinary witness to Jesus Christ happens at the local level. The impact of an individual Christian is felt, recorded, and retold by those who knew them best; and from these recollections, a liturgical commemoration might begin to take shape. The SCLM reaffirms that the local process is both vitally important and under-supported by the Church. Therefore, in this triennium, the Calendar Committee has collected materials to help congregations celebrate their saints.

The SCLM recommends this process as local worshipping communities begin to identify local exemplars of Christian discipleship and offers its assistance to those crafting liturgies of commemoration.

A012 Commons for Local Calendar Commemorations

Resolved, the House of ____ concurring, That the 80th General Convention reaffirm the diverse Commons for use in local liturgical commemoration, currently published as an Appendix in *Holy Women, Holy Men and A Great Cloud of Witnesses*; and directs that it be included as an Appendix in *Lesser Feasts and Fasts 2018*.

EXPLANATION

The collection of Commons is not currently included in *Lesser Feasts and Fasts 2018* and is an invaluable resource for the development of local commemorations. The SCLM therefore recommends the resolution.

A013 A Plan for Clarifying the Calendar of The Episcopal Church

Resolved, the House of ____ concurring, That the 80th General Convention approves a process to establish a “clear and unambiguous” Calendar of the Church, organized as follows:

1. The Calendar of *The Book of Common Prayer*, to include the authorized Principal Feasts, Feasts of Our Lord, Major Feasts, Holy Days, Days of Special Devotion, and saints of the Apostolic Age;

and

2. The Expanded Calendar of Feasts and Fasts, which expands commemorations into the post-apostolic age with authorized feasts and fasts;

And be it further

Resolved, that the following criteria shall be used for commemorations.

- I. The Calendar of *The Book of Common Prayer* (Principal Feasts, Feasts of Our Lord, Major Feasts, Holy Days and Days of Special Devotion):

Received Tradition: Grounded in the witness of Holy Scripture and the received tradition, this Calendar includes Feasts of our Lord, Holy Days, and Days of Special Devotion, as described in “The Calendar of the Church Year” in *The Book of Common Prayer 1979* beginning on page 15. Most of these have been observed ecumenically for centuries.

Extended Tradition: Grounded in the witness of Holy Scripture, this Calendar should be enlarged to diversify the extraordinary, apostolic-age witnesses currently in the tradition; authorized by The Episcopal Church during the process of Prayer Book revision; and possibly including anonymous or pseudonymous, and commonly acknowledged, witnesses whose words or example have formed Christian faith and practice.

Current Use of the Calendar: As described in *The Book of Common Prayer 1979*, Principal Feasts, Sundays and Holy Days have primacy of place in the Church’s liturgical observance.

II. The Expanded Calendar of the Church: *Lesser Feasts and Fasts*, revised and authorized by The General Convention of the Church;

And be it further

Resolved, that the Standing Commission for Liturgy and Music (SCLM) shall evaluate and periodically review the best place to display the Calendar so that it may most effectively support the formation and devotion of the Church, both in consideration of and in conjunction with ongoing revision of *The Book of Common Prayer*;

And be it further

Resolved, that the SCLM makes specific provisions to support and encourage local commemorations as part of the continuing expansion of the Calendar.

EXPLANATION

In Resolution 2018-A065 of the 79th General Convention charged the Standing Commission on Liturgy and Music to "provide the 80th General Convention with a clear and unambiguous plan for a singular calendar of *Lesser Feasts and Fasts*."

This resolution responds to these directions of General Convention.

A014 Additions to the Book of Common Prayer Calendar

Resolved, the House of ____ concurring, That the 80th General Convention direct that in the revision of the Book of Common Prayer, the following apostolic-age saints be added to the Calendar, having already received trial use according to the publications that follow each name and citation.

January 26: Timothy, Titus and Silas, companions of Saint Paul (Acts 16, Epistles to Timothy and Titus); LFF2006, LFF 2018

January 27: Lydia, Dorcas, and Phoebe, witnesses of the faith (Acts 16, Acts 9, Romans 16); GCW 2015, LFF 2018

February 26: The Woman of Samaria, traditionally known as Photini (John 4); LFF2018

July 8: Priscilla and Aquila, co-workers of Paul (Acts 18, Romans 16, 1 Cor 16, 2 Tim 4); LFF 2018

July 29: Mary, Martha, and Lazarus, of Bethany (Luke 10, John 11-12); LFF2006, LFF2018

August 1: Joseph of Arimathea (Matt 27, Mark 15, Luke 23, John 19); LFF2006

August 3: Joanna, Mary, and Salome, Myrrh-Bearing Women (Matt 28, Mark 16, John 19); LFF2018

EXPLANATION

Canon I.1.2(n)(2)v calls on the Standing Commission on Liturgy and Music. The Custodian of the Book of Common Prayer shall be a member ex officio with voice, but without vote. It shall be the duty of the Commission to:

v. Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.

The Calendar of the Book of Common Prayer is the appropriate place to commemorate saints of the Apostolic Age. The addition of these names to the Calendar both fulfills the intention of celebrating saints of the Apostolic Age and offers a more diverse body of those remembered.

A015 Authorize Holy Eucharist, Rite II, Prayer C (Expansive Language) for Trial Use

Resolved, the House of ____ concurring, That the 80th General Convention authorize The Holy Eucharist: Rite II, Prayer C, (Expansive Language) in two versions: dialogic and fixed response, for trial use throughout this church as a proposed revision within pages 369 to 372 of the Book of Common Prayer pursuant to Article X(b) of the Constitution; and be it further

Resolved, That the period of trial use for these liturgies shall extend until the completion of the next comprehensive revision of The Book of Common Prayer; and be it further

Resolved, That The Holy Eucharist: Rite II, Eucharistic Prayer C, (Expansive Language) – both versions, be provided to the church at no cost via electronic distribution; and be it further

Resolved, That the Standing Commission on Liturgy and Music be directed to engage a dynamic equivalence translation of The Holy Eucharist: Rite II, Prayer C – both versions (Expansive Language) into the Spanish, French, and Haitian Creole languages; and be it further

Resolved, That the Standing Commission on Liturgy and Music be directed to develop a process for evaluation of the ongoing use of The Holy Eucharist: Rite II, Prayer C (Expansive Language) – both versions - among the dioceses and congregations of this church.

EXPLANATION

Resolution 2018-Do78 stated that "The Holy Eucharist: Rite II, Eucharistic Prayer C, be referred to the Standing Commission on Liturgy and Music for possible revision for trial use."

Additionally, the Resolution directed the SCLM to "engage a dynamic equivalence translation of The Holy Eucharist: Rite II, including Eucharistic Prayers A, B, and D, (Expansive Language) into the Spanish, French, and Haitian Creole languages."

The proposed texts for Rite II, Eucharistic Prayer C (Expanded Language) can be found in the supplemental materials section of the report to the 80th General Convention of the Standing Committee on Liturgy and Music Subcommittee on The Book of Common Prayer (otherwise known as their "blue book" report), and also as a supporting document to this resolution.

STANDING COMMISSION REPORTS

Standing Commission on Liturgy and Music Subcommittee Reports

Subcommittee for Policy & Evaluation

Subcommittee on the Calendar

Subcommittee on Constitution and Canons

Subcommittee on Formation

Subcommittee on The Book of Common Prayer

Subcommittee on The Book of Occasional Services

Subcommittee on Liturgical Translation

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE FOR POLICY & EVALUATION

Membership

Mrs. Ellen Johnston, <i>Co-Chair</i>	Virginia, III	2021
Ms. Jessica Nelson, <i>Co-Chair</i>	Mississippi, IV	2021
Dr. Michael Boney	Colorado, VI	2021
The Rt. Rev. Terry White	Kentucky, IV	2021
The Rev. Paul Fromberg, <i>Ex Officio</i>	California, VIII	

Mandate

Resolution 2018-Do46 Expansive-Language Liturgical Resources

Resolved, That the 79th General Convention authorize continuing use of Enriching Our Worship 1: The Daily Office, Great Litany, and Eucharist; Enriching Our Worship 2: Ministry with the Sick and Dying and Burial of a Child; Enriching Our Worship 3: Burial Rites for Adults together with a Rite for the Burial of a Child; Enriching Our Worship 4: The Renewal of Ministry and the Welcoming of a New Rector or other Pastor; and Enriching Our Worship 5: Liturgies and Prayers Related to Childbearing, Childbirth, and Loss; and be it further

Resolved, That the 79th General Convention direct the Standing Commission on Liturgy and Music to develop principles for the use of inclusive and expansive language in liturgical texts, to report these principles to the 80th General Convention, and to follow these principles in all revisions of liturgical resources and in the development of any new liturgical resources; and be it further

Resolved, That the 79th General Convention encourage each diocese to identify an individual or body to encourage the development of liturgical texts to provide expansive language resources, particularly resources that reflect the breadth of cultures, languages, and ancestral contexts already represented in The Episcopal Church; and to report on their work to the Standing Commission on Liturgy and Music for inclusion in its report to the 80th General Convention.

Summary of Work

Introduction

The SCLM Sub-Committee on Policy and Evaluation met with the Task Force on Liturgical and Prayer Book Revision Sub-Committee on Expansive and Inclusive Language to formulate principles for the use of inclusive and expansive language in liturgical texts. The following enumerates the work of the sub-committees.

RESPONDING TO DIRECTION FROM GENERAL CONVENTION

The Subcommittee took direction from several resolutions of the 79th General Convention, asking for a report on inclusive/expansive language. The report follows.

Report on Inclusive/Expansive Language

Introduction

- Language is a gift of God. God is one who speaks. God calls all creation into being and gives people language as a way of responding to God and forming community.⁽¹⁾
 - In the context of God-given human freedom, languages develop as cultural products of humanity.
 - Language, while a gift of God, is damaged, finite, and limited. Language has been used for good and for ill throughout the history of the church and the world.
 - Development of liturgical language must enlist the skills of scholars, poets, linguists, musicians, and cultural specialists.
- We seek to maximize rather than erase language from our liturgical lexicon.
 - Language matters. It shapes our sense of reality, and through language we forge and maintain our relationships with God and one another.
 - Expansive Language: Expansive language seeks to tell as much truth about God as we can, utilizing the full range of language available to us. It does not displace traditional language for God but uses additional metaphors. Of course, no human language can contain God. Even so, our theologies of creation, Incarnation, and Resurrection affirm that the material world, including language, is a means to understand God in a more faithful way.⁽²⁾
 - Inclusive Language: Our language often has built-in biases that exclude and harm some persons. When exclusive language is used, we fall short of our calling to respect all who are created in the image of God. By using inclusive language for humanity, we respect the dignity of every human being and we affirm our faith in “the communion of saints” as expressed in the Apostles’ Creed.⁽³⁾

- Metaphorical Language: Words and images matter. They shape our perceptions; they can make the difference between forging trust or creating distance. Language changes and grows as the church grows in its understanding and embrace of diverse groups of people.
- The purpose of liturgy is to worship God.
- Worship in the Episcopal Church is not formulated in a vacuum.
- Ecumenical agreements and historical formulations, particularly for baptism, Eucharist, & ministry, are important norms in the work of liturgical revision and creation.⁽⁴⁾
- Liturgical language about Jews should avoid supersessionism and avoid the assumption that the assembly comprises only Gentile Christians.
- The church worships in many languages. The principles outlined in this document are primarily for use in English. Dynamic translations of inclusive and expansive language will require their own application of these principles.

Language About/For God

Expansive Language

- The church continually draws from the vocabulary of the Scriptures, expanding the treasury of language and images in order to proclaim the fullness of the triune God.⁽⁵⁾
- We aim to expand language for God (names, metaphors) that has not been included in our current liturgical language, maximizing/multiplying our liturgy's language for God
 - This includes but is not limited to, drawing language/verbal pictures from Scripture and from the 2,000-year-old textual deposit of Christian liturgy and theology.
 - As the church expands its liturgical language for God, it should attend to imagery that has resonated with different Christian communities, in different times, places, and cultural landscapes.
 - The church recognizes that the Old Testament/Hebrew Scriptures constitutes a majority of our Scripture; i.e., we ought not always default to language drawn from the New Testament.
 - We seek language for God that implicitly acknowledges that all of humanity is created in the image of God, being mindful in particular of the ways that gendered language for God can sometimes imply otherwise.
- Liturgical revision/expansion recognizes that any single given prayer is part of a larger liturgical whole; no single prayer need bear the entire burden for expanding God-language.
- It is especially important that principal liturgies (Holy Baptism and Holy Eucharist, Liturgies of the Word, the Psalter) engage expansive language.

- As we seek such language in principal liturgies, we attend to earlier liturgies that have offered expanded images, e.g. the font as the womb of the church.⁽⁶⁾
- Liturgists ought not presume that there is only one pronoun for God.
- We understand that in using language about God, multiple goods (ethical goods, moral goods, pastoral goods, theological goods, historical goods etc.) are in play, and sometimes these are in tension with each other. Those who craft prayers seek to attend to the assembly, the Bible, creedal statements, etc., and when, in the work of new liturgy, the demands of one of those is in tension with the demands of another, we acknowledge the tension and allow it to be generative.

Language About/For Humanity

Inclusive Language

- Liturgical language for persons should reflect the diversity of all humankind.
- Liturgical language needs to recognize the history and lived experience of each community and the rich diversity that is present in those communities.
- All worshipping communities deserve to name themselves and have their names be honored. For example, a congregation may prefer to be called a church for the “deaf” rather than “hearing-impaired.”
- Prayers and liturgies should strive to avoid instances of cultural appropriation that are insensitive and even experienced as violent to the original culture. When communities do use prayers drawn from other cultures, such use should be sensitive to the original meaning and context.
- As much as possible it is important to avoid binaries as standing for the whole of humanity. For example, “brothers and sisters” may exclude those who are gender-non-binary.

Language Not Referring to God or Humanity

Metaphorical Language (e.g. light, hearing, seeing, standing etc.)

- Those crafting liturgies ought to be attentive to ways liturgical language may have an implicit politics, may unintentionally arrange power, or may imply an anthropology in ways that contradict the Baptismal Covenant.
- e.g., Light vs Darkness, Sight vs Blindness

Conclusion

The transcendent God, who is at the heart of our liturgy and worship, “surpasses all human understanding.”⁽⁷⁾ Our language of worship, therefore, points to and evokes the mystery of God – God whom we cannot fully comprehend or completely imagine, and yet God who is revealed to us in words and images conveyed across “family, language, people, and nation.”⁽⁸⁾ The Church’s liturgical language is by its nature transcultural, contextual, countercultural, and cross-cultural.⁽⁹⁾ And the Church’s liturgical language is biblical, drawing on the stories and images of Scripture. Through expansive, inclusive, and metaphorical language, the Church aims to participate in the mysterious abundance of God and to speak to God in language that might delight the One who delightfully created diversity and abundance.

Resolution 2018-Do40 The Status of Women Church Musicians

Title: Refer a Resolution on the Status of Women Church Musicians

Resolved, That the 79th General Convention directs the Standing Commission on Liturgy and Music to study the status of Women Musicians in the Episcopal Church, specifically considering the following: the status of resources within congregations and dioceses for the development of young musicians, specifically young women musicians; assistance for the encouragement of women who wish to become stipendiary church musicians; what percentage of women are full-time stipendiary musicians compared to men; what percentage of women are found in the final slate of candidates; and what is the percentage of stipendiary women church musicians in other denominations and, if higher, learn from them possible avenues to increase employment of women musicians within the Episcopal Church; and be it further

Resolved, That the 79th General Convention request that the body to which this Resolution is referred to report its findings to the 80th General Convention.

Legislative Action Taken: Referred

Although no action was required of the SCLM, members of the Subcommittee for Policy and Evaluation had a number of discussions with one of the proposers of 2018-Do40, Dr. Nancy Cooper, organist and choirmaster at Church of the Holy Spirit in Missoula, Montana and member of the music faculty at the University of Montana, to discuss the rationale behind the resolution. Those conversations indicated further action was merited.

We ultimately chose to partner with the Association of Anglican Musicians, the professional organization for musicians serving Episcopal churches, to draft a survey gathering data from women musicians serving in the Episcopal Church. This anonymous survey was sent to women members of

AAM and yielded 96 responses. This survey solicited both quantitative data about parishes served as well as narrative data about the hiring processes in which those musicians have participated.

Almost a quarter of survey respondents report incidents in which they believe that they have been discriminated against because of their gender identity. Survey respondents related instances of unfair treatment by hiring committees, compensation and benefit disparity between the respondent and similarly qualified male members of staff once hired, and incidents of sexual misconduct perpetrated against the respondent. It is our hope to compile this data into narrative form and draft an article for the Journal of the Association of Anglican Musicians. The quantitative information is included as a part of this report; the narrative data is not, because several respondents named specific parishes and shared other personal identifying details.

After the completion of this survey, we sought to gather data from Church Pension Group related to the employment of women church musicians in Episcopal Churches, but CPG was unable to furnish us any information at all about the employment of laypersons, reporting to us that they only gather data about the employment of clergy.

End Notes

- (1) Adapted from the ELCA “Principles for Worship”: <https://www.elca.org/> (last accessed October 2019).
- (2) Adapted from the University of the South School of Theology, “Language Matters” (Advent 2018).
- (3) Ibid.
- (4) World Council of Churches agreed document 1982 <http://bit.ly/35hGNjt>. The Lima Agreement.
- (5) Adapted from the ELCA “Principles for Worship”: <https://www.elca.org/> (last accessed October 2019).
- (6) See, e.g., Robin M. Jensen, “Mater Ecclesia and Fons Aeterna: The Church and Her Womb in Ancient Christian Tradition.” in Amy-Jill Levine and Maria Mayo Robbins, eds., *A Feminist Companion to Patristic Literature*, ed. (New York: T & T Clark, 2008), 137-53.
- (7) Philippians 4:7.
- (8) Revelations 7:9. Book of Common Prayer 1979 Page 94 Canticle 18.
- (9) “Nairobi Statement on Worship and Culture,” in S. Anita Stauffer, ed, *Christian Worship: Unity in Cultural Diversity* (Geneva: Lutheran World Federation, 1996), 23-28.

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE ON THE CALENDAR

Membership

The Rev. Susan Anslow Williams, <i>Chair</i>	Michigan, V	2021
Mr. Thomas Alexander	Arkansas, VII	2021
The Rev. Debra Bennett	Ohio, V	2021
The Rev. Canon Robert Hino	Hawaii, VIII	2021
Mr. John Robert	Western Louisiana, VII	2021
Br. Angel Roque, BSG	Southeast Florida, IV	2021
The Rt. Rev. Andrew Waldo	Upper South Carolina, IV	2021
The Rev. Paul Fromberg, <i>Ex Officio</i>	California, VIII	

Mandate

The Calendar Committee acts upon resolutions referred to the SCLM by the General Convention, and proposals from individuals or groups during the triennium, concerning commemorations for the Calendar of the Church. The 79th General Convention sent our committee seven such referrals:

- Resolution 2018-C012 Add Origen of Alexandria to the Church Calendar
- Resolution 2018-C046 Commemorating Appleton Deaconesses
- Resolution 2018-C055 Commemoration of Father Paul Wattson
- Resolution 2018-C058 Add The Rev. Frederick B. "Ted" Howden Jr. to LFF, 2018
- Resolution 2018-C065 Include The Reverend John Edwin Culmer in Feast/Fast Calendar
- Resolution 2018-D012 Add the Four Chaplains of the USAT Dorchester to the Church Calendar
- Resolution 2018-A067 Propose Additional Optional Fast Days for Lesser Feasts and Fasts

The Convention also asked us to prepare a plan for unifying and clarifying the Calendar in the future, in Resolution 2018-A065 Authorize Lesser Feasts and Fasts 2018. The SCLM later received four proposals for new commemorations during the triennium, and three requests to edit existing commemorations. This work is also part of our Committee's mandate.

Summary of Work

INTRODUCTION

Members of the Calendar subcommittee of SCLM met over Zoom every-other-month, in addition to the full SCLM sessions. Our work during the triennium was divided into three projects:

1. Perfecting *Lesser Feasts and Fasts 2018*, which was approved for trial use by the 79th General Convention, by considering new commemorations referred to the SCLM by General Convention, and several proposed commemorations and updates sent to the SCLM during the triennium;
2. Providing congregations and dioceses with additional support for developing local commemorations, which is normally a prerequisite for inclusion in the church-wide calendar;
3. Proposing a plan for the future development of the Calendar of the Church that provides a more unified approach to its major and optional observances [2018-A065]; this plan taking effect through the ongoing revision of the Book of Common Prayer.

RESPONDING TO DIRECTION FROM GENERAL CONVENTION

The Subcommittee took direction from several resolutions of the 79th General Convention, asking for certain commemorations to be included in LFF as well as a clear and unambiguous plan for a singular calendar of Lesser Feasts and Fasts.

Lesser Feasts and Fasts (2018) Revision

Committee: Susan Anslow Williams, Stannard Baker, Paul Fromberg. Consultants: Julie Groce, Shannon Johnston, Keith McCoy, Bradley Arthur Peterson, Geraldine Swanson, members of the “Prayer Book Revision: Discussion and Debate” group on Facebook.

As a core component of its mandate (Canon I.1.2.v) SCLM is asked by every General Convention to consider new commemorations for the church-wide calendar. Since 2003, previous Conventions had directed that the church-wide Calendar reflect the diversity of persons and groups within the Episcopal Church.

The volumes *Holy Women, Holy Men* (2012) and *A Great Cloud of Witnesses* (2015) offered the Church a breadth of optional commemorations, asking for feedback from congregations, dioceses, and worshipping bodies of the Church.

The result was *Lesser Feasts and Fasts 2018*, approved for trial use in the triennium 2018-2021. This volume includes many commemorations from *A Great Cloud of Witnesses* and suggested a two-tier approach to assist in deciding which of commemorations to observe. Those listed on pages 31-42 of *Lesser Feasts and Fasts 2018*, as prepared for the 79th General Convention, were still in development as “local” commemorations which had not yet met all the criteria for calendar inclusion, described in the section “Principles of Revision.”

The SCLM was asked by the 79th General Convention to clarify these and other issues arising from multiple versions of the calendar over the years, and the rapidly-growing number of commemorations. Informal surveys conducted via Facebook confirmed a broad range of Calendar usage, appreciation, and confusion among Episcopalians “in the pews.”

For the triennium 2021-2024, SCLM recommends the continued use of *Lesser Feasts and Fasts 2018* without the second list of Supplemental/Local Commemorations; and revised by this 80th General Convention as follows in our report.

Responding to General Convention: Fast Days

The SCLM was also asked to propose some additional Fast days (2018-A067). We considered several possibilities for commemorating tragic events or historic injustices with a liturgical fast corresponding to a particular date. However, we did not reach a consensus on what such a service would look like, based on the variety of traditions in the Church; nor whether a scheduled fast, beyond those already listed in the BCP, was helpful to the worship and formation of the Church. Provision is made (BCP page 13) for bishops to appoint special days of fasting in response to a particular situation, and this seemed the most helpful way to address the request. In addition to consulting their diocesan Liturgy Commissions, bishops can request materials from the SCLM to meet their needs.

2018-A067 Propose Additional Optional Fast Days for Lesser Feasts and Fasts Church

No action was taken at this time.

Responding to General Convention: New Commemorations

The SCLM was tasked by the 79th General Convention to consider the following persons for inclusion in the Church’s Calendar and the next edition of *Lesser Feasts and Fasts*:

- Origin of Alexandria (2018-C012)
- Dorothy Day (2018-C027)

- Appleton Deaconesses (2018-Co46)
- Paul Wattson (2018-Co55)
- Frederick B. Howden, Jr (2018-Co58)
- John Edwin Culmer (2018-Co65)
- Chaplains of the USAT Dorchester (2018-Do12)

During the triennium, four commemorations were sent to us for consideration:

- Simeon Bachos the Ethiopian Eunuch
- Ida B. Wells-Barnett
- Peter Quire
- Brother Roger Schutz

As the Calendar Committee researched the proposed commemorations, we discovered that in many cases, one or more of the criteria for churchwide calendar inclusion had not been met. We have clarified those criteria slightly in the Resolution A010 Lesser Feasts and Fasts Principles of Revision; the new content does not differ significantly from the set last approved by General Convention in 2009 and published in *Holy Women, Holy Men*.

2018-Co12 Add Origen of Alexandria to the Church Calendar

After careful consideration by the SCLM, this resolution was Rejected.

2018-Co27 The Celebration of the life and work of Dorothy Day, Christian Activist

After careful consideration by the SCLM, this resolution was Rejected.

2018-Co55 Commemoration of Father Paul Wattson

After careful consideration by the SCLM, this resolution was Rejected.

2018-Co65 Resolution Include The Reverend John Edwin Culmer in Feast/Fast Calendar

After careful consideration by the SCLM, this resolution was Rejected.

2018-Do12 Add the Four Chaplains of the USAT Dorchester to the Church Calendar

After careful consideration by the SCLM, this resolution was Rejected.

Additionally, Ida B. Wells-Barnett, Peter Quire, and Roger Schutz, did not meet the criteria and we have not furthered these proposals.

2018-Co46 Commemorating Appleton Deaconesses

After careful consideration by the SCLM, a substitute resolution is being proposed to replace 2018-Co46 (see the resolution "A008 Additional Calendar Commemorations").

2018-Co58 Add The Rev. Frederick B. "Ted" Howden Jr. to LFF, 2018

After careful consideration by the SCLM, a substitute resolution is being proposed to replace 2018-Co58 (see the resolution "A008 Additional Calendar Commemorations").

New Commemorations

We propose three new commemorations to the Calendar:

- Simeon Bachos, the Ethiopian Eunuch, August 27
- Episcopal Deaconesses, September 22
- Frederick Howden, Jr., December 11

The Ethiopian Eunuch, by tradition named Simeon Bachos

In response to the urging of the 76th General Convention (2009) that, "Attention should also be paid to gender and race, to the inclusion of lay people (witnessing in this way to our baptismal understanding of the Church), and to ecumenical representation;" the SCLM was enthusiastic to receive a proposal for inclusion of the Ethiopian Eunuch, first African Christian, whose story is told in Chapter eight of the Acts of the Apostles.

Deaconesses of the Episcopal Church

A commemoration of the Appleton Deaconesses had been referred to the SCLM by the 79th General Convention (2018-Co46), and the criteria for adding them to the church-wide calendar have been met. Early in the triennium, the SCLM received word that additional resolutions to honor the life and work of the deaconesses of the Episcopal Church were being developed for the 80th General Convention. When asked to support work on separate observances for several organizations related to this historic ministry, the SCLM decided that a combined day would have more impact for modern understanding of the deaconess movement.

SCLM member Stannard Baker was commissioned to bring this idea to the annual meeting of Archdeacons and other Deacon Leaders, in early March of 2020. Those in attendance were enthusiastically in support and as a result, a workgroup was formed with three deacon members: Geraldine Swanson, Keith McCoy, and Stannard Baker, facilitator; one priest, Susan A. Williams, chair of the Calendar subcommittee of SCLM; Julie Groce, Missioner, Appleton Episcopal Ministries; and Bradley A. Peterson, church historian and professor in the College of Deacons in the Diocese of California.

The workgroup met over Zoom four times to create collects, propers, background information, and a historical record of the deaconess movement; as well as a chronology of the various deaconess houses and ministries. Most of the abundant and inspiring information gathered by the workgroup will have to be shared online or in future publications, to maintain the succinct biographical format of *Lesser Feasts and Fasts*.

Military Chaplains killed in service

The Rev. Frederick B. "Ted" Howden, Jr. was referred to the SCLM for calendar inclusion (2018-Co58, and the criteria have been met. Recognizing that the Church sends military chaplains around the world to serve in a variety of dangerous situations, surely other heroic men and women are being remembered by Episcopalians. With the support of the Bishop of the Armed Forces, the Right Rev. Carl Wright, the new commemoration of Frederick Howden includes the option for local additions of names.

These three commemorations are proposed for trial in proposed resolution A008 "Additional Calendar Commemorations".

Revision of Existing Commemorations

During the triennium, the SCLM was asked to update the following commemorations with improved biographical materials and, if needed, propers. The following were prepared or edited by the Calendar Committee and can be found in the resolution A009 "Revision of Existing Calendar Commemorations."

- Absalom Jones, February 13, update biography
- Maryam of Qidun, October 29, update biography, collect and propers
- The Martyrs of Japan, February 5, update biography
- William Porcher DuBose, August 18, removal from the calendar following historical research

Revision of the commemorations of Absalom Jones, Maryam of Qidun, and the Martyrs of Japan

During the triennium, the SCLM was asked to update these commemorations with improved biographical materials and, as needed, proper. These updates were prepared or edited by the Calendar Committee. The new entries are found in the body of the proposed resolution.

Removal of William Porcher DuBose from the calendar following historical research

The 76th General Convention adopted criteria for inclusion in the Calendar of the Church Year, including that “those commemorated should have been in their lifetime extraordinary, even heroic servants of God and God’s people for the sake, and after the example, of Jesus Christ.”

The Standing Commission on Liturgy and Music has received comment from the Church raising the concern that William Porcher DuBose embraced views antithetical to the Gospel and in contradiction to the Church’s promise to strive for justice and peace and respect the dignity of every human being.

DuBose directly benefited from the fact that his family were slaveholders in Fairfield County, South Carolina; in 1860, his father enslaved 204 persons. DuBose was a combat officer in the Confederate army and chaplain in the Confederate Arm, taking up arms to defend slavery, at one point commanding a regiment that participated in the invasion of Maryland (William Porcher DuBose, *Turning Points in My Life* [London, 1912], p. 34-35). He later resigned his commission to become a chaplain in the Army of Northern Virginia. He continued to hold and publish white supremacist views after the war, as late as 1914, and long after the war he remained unrepentant for the South’s slaveholding past. He also perpetuated the myth of the “Lost Cause” in his secular writings. In unpublished portions of his memoirs, DuBose described the formation of the terrorist group the Ku Klux Klan in the post-war period thus: “The condition of things just compelled some such organization as the Ku Klux Klan. It was an inspiration of genius—the most discreet and successful management of the situation that could have been devised” (William Porcher DuBose *Reminiscences*, p. 139-140, #1006-z, Southern Historical Collection, The Wilson Library, University of North Carolina at Chapel Hill). Long after 1865, DuBose clung to the ideology of the slaveholding Confederacy.

As the Church continues to strive against white supremacy and the sin of racism, we must not raise as examples of heroic service those who in their lives actively worked to devalue whole classes of human persons. By telling the truth about racism and acting to delegitimize those who perpetuate racism, Christians can continue to fulfill the high call of the Gospel to walk in the love of Christ, the justice of God, and the conviction of the Holy Spirit.

Principles of Revision

During the 2018-2021 triennium, the SCLM studied the criteria for inclusion in the calendar of the church year authorized by Resolution 2009-A098. The Commission concluded that these criteria need to be edited for the sake of clarity and to emphasize the development of local commemorations in parishes and dioceses across the church. These principles are also offered in response to General Convention's charge to the SCLM in Resolution 2018-A065 that the SCLM propose "a clear and unambiguous plan for a singular calendar of *Lesser Feasts and Fasts*." The Commission proposes the following principles of revision to guide the choices that the church makes in adding commemorations to the Calendar.

The qualifications and benchmarks for inclusion in the church calendar are as follows.

1. **Christian Discipleship:** Christian witness resulting in death, precious in God's sight, is the ultimate witness to the power of the Resurrection. The Expanded Calendar therefore commemorates the completion in or by death of a particular Christian's faithfulness to baptismal life in Jesus Christ. Baptism is a necessary prerequisite for inclusion in the Calendar.
2. **Significance:** The Expanded Calendar commemorates those who were, in their lifetime, extraordinary, even heroic servants of God and God's people for the sake, and after the example, of Jesus Christ. The Expanded Calendar may also commemorate persons whose creative work or whose manner of life has glorified God, enriched the life of the Church, or led others to a deeper understanding of God. It commemorates those whose lives, in varied ways, revealed Christ's presence in, and Lordship over, all of history, and who continue to inspire us as we carry forward God's mission in the world. It includes persons who remind us of our participation in the great cloud of witnesses and membership in a timeless community of prayer.
3. **Memorability:** The Calendar includes those who, through their devotion to Christ and their joyful and loving participation in the community of the faithful, deserve to be remembered by the Episcopal Church today. In order to celebrate the whole history of salvation, it is important also to include those "whose memory may have faded in the shifting fashions of public concern, but whose witness is deemed important to the life and mission of the Church" (Thomas Talley).
4. **Range of Inclusion:** The Calendar especially includes Episcopalians and other members of the Anglican Communion. The Calendar seeks to represent the full breadth and depth of the

Body of Christ, focusing on principles of Christian witness and discipleship, and honoring the movement of the Holy Spirit in the establishment of local observance.

5. Local Observance: Before a commemoration is included in the Calendar, proposers must establish that significant, enduring local and regional commemoration in corporate worship exists.
6. Perspective: The passage of time permits the testing, endurance and flowering of Christian witness. The norm is that the Expanded Calendar will include a person only after two generations or fifty years have elapsed since that person's death. Exceptions will be rare.
7. Distribution of Commemorations: Normally, joint commemoration will arise from shared Christian witness or date of death. In some cases, unrelated commemorations will occur on the same date. In the observance of lesser feasts, the preference of the local community may be exercised.
8. Liturgical Use: Scriptures and Collects appointed for Expanded Calendar commemorations are intended for use in the Eucharist, Daily Office, or personal devotions.

The process for including the commemoration of Óscar Romero (March 24) demonstrates how the Principles of Revision can be used for inclusion in the Calendar of the Church Year.

1. Historicity – Óscar Romero's life was a witness to the Gospel of Christ in his teachings and actions. He wrote and preached about human rights and openly spoke out against oppression, even in the face of the oppressors. His witness is well documented in both the church and secular press.
2. Christian Discipleship – Óscar Romero was the Archbishop of the Archdiocese of San Salvador of the Roman Catholic Church. In this office he lived the truth of the gospel in both word and deed.
3. Significance – Throughout Óscar Romero's ministry, he committed himself to working for and serving the poor and the disenfranchised, especially those who were ignored or oppressed by the powers engaged in the Salvadoran civil war. He also advocated for the oppressed by working with the poor in his community and shared his experience with Pope John Paul II when Romero visited Rome in 1979.
4. Memorability – Óscar Romero's life teaches Episcopalians the global reach of the gospel, that there are witnesses in the Church apart from the United States. His witness shows that communities of Christians worldwide struggle with their faith in the face of oppression. Many leaders continue to fight for human rights and representation in their communities.

Since Romero's death, he has not been forgotten by communities in El Salvador or by those communities of Salvadorans abroad, including in the Episcopal Church.

5. Range of Inclusion – Óscar Romero used his position of influence as a Roman Catholic bishop to fight for all of the communities that were being oppressed during the Salvadoran civil war, regardless of affiliation with a specific community. His example exemplifies Jesus' mission to welcome all into the Way of Love.
6. Local Observance – Newspapers and other testimonies show that immediately following Óscar Romero's assassination, he was proclaimed as "Saint Romero," His life continued to inspire Christians within El Salvador. Within the Anglican Communion, Romero was memorialized in 1998 as one of the 20th-century martyrs displayed on the Great West Door of Westminster Abbey. Many congregations around the United States recognized and venerated Romero. Some newer congregations use San Romero as their patron saint and did so well before the Roman Catholic Church moved to canonize him. Romero was one of the proposed additions to the Church Calendar in 2006 for trial use, according to Resolution 2006-A063, and he was included in the publication of Holy Women, Holy Men after being approved in 2009 in General Convention Resolution 2009-A095.
7. Perspective – Óscar Romero was martyred in 1980, and he has been remembered to a great extent since the day of his death. His life, martyrdom, and series of commemorations became the backdrop for his inclusion in the Church Calendar despite being proposed in The Episcopal Church only 26 years after his martyrdom. And in accordance with the ancient practice of the Church, martyrs may be added to the sanctoral cycle shortly after their deaths.
8. Distribution of Commemorations – This criterium is not relevant to this commemoration.
9. Liturgical Use – Romero's commemoration is kept by individuals and in congregations, both in the Daily Office and the weekday celebration of the Holy Eucharist.

Local Calendars and Memorials

Committee: Thomas Alexander, Susan Anslow Williams, Debra Bennett, Robert Hino, Ellis Montes, John Robert. Consultants: Jemonde Taylor, Nan Peete.

The earliest, liturgical recognition of an extraordinary witness to Jesus Christ happens at the local level. The impact of an individual Christian is felt, recorded, and retold by those who knew them best; and from these recollections, a liturgical commemoration might begin to take shape. The SCLM

reaffirms that the local process is both vitally important and under-supported by the Church. Therefore, in this triennium, the Calendar Committee has collected materials to help congregations celebrate their saints. A “case study” of how commemorations develop are offered below to illustrate.

Process and Guiding Questions for Developing Local Commemorations

The SCLM recommends the following process as local worshipping communities begin to identify local exemplars of Christian discipleship and offers its assistance to those crafting liturgies of commemoration.

Crafting Liturgical Commemorations

History demonstrates that liturgical commemorations originate in the local community. Indeed, all proposed additions to the Calendar of the Church ought to begin as local commemorations. Included below is a process for developing such local observances, as well as some guiding questions that might help the local community through the process.

The Book of Common Prayer (pp. 13, 18, 195, and 246) permits memorials not listed in the Calendar, provides collects and readings for them (the Common of Saints), and recognizes the bishop’s authority to set forth devotions for occasions for which no prayer or service has been provided by the Prayer Book. Although the Prayer Book does not require the bishop’s permission to use the Common of Saints for memorials not included in the Calendar, it is appropriate that the bishop’s consent be requested.

While these guidelines are general in nature, and not exhaustive in scope or situation, this process is suggested for initiating local, diocesan, or regional memorials.

1. Establishment: A congregation, diocese, other community or organization establishes a commemoration for a specific person/occasion, on a specific day.
 - Who/what is being commemorated? Why is this commemoration beneficial to the local community’s liturgical life? What would be lost if the commemoration were not observed? (See the most recent set of criteria for inclusion in the Calendar of the Church; and the set of Holy Days, BCP p. 16, that take precedence on their dates.)
2. Collects and Readings: A collect and readings from the Common of Saints are chosen and used. Perhaps a new collect may be composed, and a new collection of readings assigned

for use in the commemoration. The Standing Commission on Liturgy and Music and local diocesan liturgical bodies are available for consultation.

- How might selections from Holy Scripture and the chosen, or new, collect communicate the reason for observing the commemoration? What selections of Holy Scripture will help the congregation to better understand the commemoration? What do we need to pray for in the collect to better understand the commemoration?
3. Observance: The congregation, diocese, province, or organization proceeds to annually observe the commemoration in their regular liturgical life.
- How might you invite others to join the celebration? Does it make sense to invite the local community? Nearby congregations? The diocese? The province?
4. Evaluation: The local community should engage in ongoing evaluation of the commemoration. The evaluation should include conversation with members of the community and with participants in the observance. Earlier steps should be revisited if necessary.
- How has your thinking in previous steps evolved through your observance of the commemoration? What have you learned? What feedback have you received? What has surprised you as you've observed the commemoration? To what extent has the local community embraced the observance? Does anything need to change? How might the readings and collect need to be adapted?
5. Wider Recognition: Those interested in promoting a wider commemoration then begin to share the developed materials with others, suggesting that they also adopt the commemoration. If at some time it is desired to propose it for optional observance by the wider Church, documented evidence of the spread and duration of local commemoration is essential to include in the proposal to the General Convention.
- Why should the commemoration be observed by the wider Church? What would the wider Church lose if it did not observe this commemoration? How would this commemoration strengthen or balance the Calendar of the Church? (See the most recent set of criteria for inclusion in the Calendar of the Church.)

Some commemorations, perhaps many, will remain local, diocesan, or regional in character. This in no way reduces their importance to those who revere and seek to keep alive the memory of beloved

and faithful witnesses to Christ. Regardless of local or Church-wide use, The Book of Common Prayer welcomes regular, local commemorations in the liturgical life of the Church.

An Illustration of a Locally-developed Commemoration

The Brilliant Blackness of the Sanctoral Cycle, by The Reverend Jemonde Taylor, Rector, Saint Ambrose Episcopal Church, Raleigh, N.C.

The black sanctoral cycle affirms the important religious contributions and essential membership of black people in the cloud of witnesses. Saint Ambrose Episcopal Church, Raleigh, N.C. serves as a touchpoint for that reality through its worship and education practices with intentional commemoration/veneration of black people in the sanctoral cycle.

The sacred dance between icons and pilgrimage serves as the vehicle through which veneration occurs. Icons of three black Episcopal saints with connections to Saint Ambrose hang in the transept: Blessed Anna Julia Cooper [Calendar observance on February 27]; Blessed Henry Beard Delany [April 14]; and Blessed Pauli Murray [July 1]. Blessed Cooper and Blessed Delany are buried within three miles of the church. In 1978, Blessed Murray preached and celebrated Eucharist at Saint Ambrose to a crowd of nearly 300. The congregation gathers on the Wednesday closest to each feast day for a Healing Eucharist and to caravan to their gravesites with the icon in the lead car. We gather around the gravesite with someone holding the icon near the headstone and we offer prayers. Blessed Delany's great-granddaughter traditionally holds his icon.

Saint Ambrose celebrates other black saints throughout the year with special worship services: Blessed Martin Luther King, Jr. [January 15]; Blessed Absalom Jones [February 13]; Saint Monnica [May 4]; Saint Augustine of Hippo [August 28]. We sing hymns dedicated to the saints from the *Lift Every Voice and Sing II: An African-American Hymnal*. Our intercessory prayer ministry bears the name of Blessed Absalom. An icon of him is affixed to our prayer roll box where parishioners leave prayer requests. Ushers process this box to the altar along with the Communion vessels each Sunday. Included in our commemorations is celebration of our patron saint's feast day (December 7).

The church's needlepoint ministry continues to make altar kneelers of black saints including Saint Augustine, Saint Monnica, Blessed Cooper, Blessed Delany, and Blessed Murray.

Clarifying the Calendar of the Church

Membership: Thomas Alexander, Susan Anslow Williams, Debra Bennett, Angel Roque, Andrew Waldo.

Through resolution 2018-A065, the 79th General Convention called the SCLM to:

Provide the 80th General Convention with a clear and unambiguous plan for a singular calendar of Lesser Feasts and Fasts; and

Respond to the stated desire to increase the diversity of saints, by authorizing for trial use the diverse commemorations collected in *Lesser Feasts and Fasts 2018* and *A Great Cloud of Witnesses* (2015), in addition to the most recent Calendar fully authorized by General Convention in *Lesser Feasts and Fasts 2006*.

The Future of the Church's Calendar

This report and its recommendations address both intentions of 2018-A065's mandate. However, implementation would happen within the revision of The Book of Common Prayer, and not appear until the next iteration of the Calendar of the Church. In other words, the Calendar within the current Book of Common Prayer (pages 19-30) would not be changed should the 80th General Convention support our resolutions.

Background: In 1976 the General Convention integrated the commemoration dates of saints listed in Lesser Feast and Fasts published in the Calendar of Feasts of our Lord and other Major Feasts/Holy Days in the Proposed Book of Common Prayer, pages 15-33. Since that time, the list of other commemorations has continually evolved, expanded, and diversified.

The sheer volume of resulting commemorations, as well as continuing efforts to expand them, has created a pressing need for “a clear and unambiguous plan for a singular calendar of Lesser Feasts and Fasts.”

Toward achieving this goal, the SCLM has found it helpful:

1. To articulate corporate and personal contexts of calendar use, and how changes in the presentation of these commemorations might simplify and strengthen their use. Recognizing various approaches to Christian formation in scriptural devotion and study, this response prioritizes the Book of Common Prayer Calendar as the primary source for in-course devotion and study of scripture; and the Expanded Calendar of Lesser Feasts and Fasts as the primary source for reflection on post-apostolic witness and history.
2. To articulate below a rationale for including only Feasts of our Lord and Major Feasts/Holy Days within the Book of Common Prayer, and to place all other approved commemorations in Lesser Feasts and Fasts.

3. To clarify the criteria for inclusion of commemorations in Lesser Feasts and Fasts, with particular emphasis on local/regional commemoration; and to propose, generally, extending the Book of Common Prayer “Major Feasts” strategically, to include greater gender and ethnic diversity while maintaining biblical criteria for these feasts.

Corporate and personal contexts of calendar use

Common Prayer

In our *faith*, “common prayer” describes the shared historical events and spiritual persons we commonly recognize as seminal, formative, and generative—most notably within the Bible’s prophetic, historical, and wisdom literature culminating in the life, work, suffering, death and resurrection of Jesus Christ. The commonality of these events and persons reaches across ecumenical boundaries.

In our *tradition*, “Common Prayer” also describes the shared prayer and liturgical order of the gathered Anglican assembly across time (*chronos* and *kairos*), life (given and experienced), and space (geography, movement, and architecture). The Book of Common Prayer Calendar emphasizes Principal Feasts, Feasts of our Lord, and Holy Days which are acknowledged broadly and ecumenically, rooted in biblical and apostolic times. Since 1976 the Calendar has also included, de-emphasized but present, commemorations of both commonly- and less-broadly-acknowledged post-apostolic events and persons.

Corporate prayer

Here, “Corporate prayer” represents both the larger sense, above, of transcendent Common prayer and the more localized sense of a particular people gathering in particular places at particular times.

In the former sense, corporate commemorations include persons and events that clearly evoke the larger and more seminal narrative of faith in Jesus Christ. In the latter sense, corporate commemorations represent more localized experiences and more particular and important doctrinal or spiritual developments or contributions to the Church’s ongoing, post-apostolic narrative of God’s mission in human history.

Personal prayer

“Personal prayer” represents the use of commemorations in forming and informing our individual disciplines and rules of life, within which we discover and embrace a procession of persons whose examples direct and form our personal paths on Jesus’ Way of Love.

Whether Common, corporate, or personal, these commemorations call us into relationship with particular witnesses to Christian faith whose real lives in real places at real times were extraordinary or exemplary. They teach us real-life “details” in our call to discipleship—personal, missional, doctrinal, spiritual, mystical, and ecclesiastical.

A Calendar Taxonomy

The Book of Common Prayer Calendar

Following the above approach suggests that the Book of Common Prayer Calendar, expanded to include more diversity within the biblical and apostolic frame, should stand alone as a galvanizing and common statement about first principles and persons in Christian faith and Anglican practice. It thus becomes an ecclesiastical expression that “This is the fundamental story upon which our lives are grounded.”

In this taxonomy, the Book of Common Prayer Calendar would only include Principal Feasts, Feasts of Our Lord, other Major Feasts and Holy Days, and, in the Eucharistic and Office Lectionaries, the more generalized Common of Saints, Various Occasions and Days of National Observance.

Expanded Calendar of Lesser Feasts and Fasts

Post-Apostolic feasts and fasts would all be gathered into the Expanded Calendar, known since 1963 as *Lesser Feasts and Fasts*, with the revised criteria and required disciplines in selecting commemorations. The Expanded Calendar would serve the Church as a resource for:

1. Optional observances in corporate prayer—Eucharist, Office, or informal—subject to Book of Common Prayer rubrics;
2. Topical or special observances in corporate gatherings, retreats, conferences, etc., subject to Book of Common Prayer rubrics;
3. Aids in personal devotion and practice; and
4. Observances and tools for teaching and formation.

Conclusion

Separating the Book of Common Prayer Calendar and the post-apostolic Expanded Calendar (*Lesser Feasts and Fasts*) creates a prioritized, structural clarity for Episcopalians at all levels of engagement in understanding how and why Jesus is “the pioneer and perfecter of our faith.” Proclaiming, studying, praying, and learning how to interpret Holy Scripture, Sundays using the Revised Common

or BCP Lectionary and during the week with in-course Daily Office readings, grounds the community in its basic story. Through the observance of major and lesser feasts in personal, local or broader observances, the community is formed by particular witnesses throughout history to that basic faith and story—whether that takes place in special Eucharistic and community observances, or as adjunctive reflections in personal devotions.

The apostolic witness represented in the Book of Common Prayer Calendar may be expanded in gender and ethnic diversity, recognizing that such diversity is, by definition, limited to ethnicities present within the biblical narrative itself. With the clarification of criteria, described below, further diversification of the Expanded Calendar can proceed accordingly.

Recommendations for Publication

In light of ongoing liturgical revision, the SCLM recommends publishing the Calendars and Lectionaries together, bound as a separate unit entirely, entitled “The Calendar of the Church,” with major divisions for The Book of Common Prayer and for Expanded Calendar: Lesser Feasts and Fasts. Prefatory material should articulate intended usages and the different canonical priorities and requirements for each Calendar. SCLM also envisions the inclusion of resources and commentary to support local commemoration of faithful witnesses.

Proposed resolutions

A007 Authorize Lesser Feasts and Fasts 2018

A008 Additional Calendar Commemorations

A009 Revision of Existing Calendar Commemorations

A010 Lesser Feasts and Fasts Revision Principles

A011 Develop Local Commemorations

A012 Commons for Local Calendar Commemorations

A013 A Plan for Clarifying the Calendar of The Episcopal Church

A014 Additions to the Book of Common Prayer Calendar

Supplemental Materials

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1. [Proposed Calendar of the Church, Including Lesser Feasts and Fasts 2018 / 2021](#)
2. [Three New Calendar Commemorations - Biographies](#)

Proposed Calendar of the Church, Including *Lesser Feasts and Fasts 2018 / 2021*

JANUARY

- 1 THE HOLY NAME OF OUR LORD JESUS CHRIST
- 2 Gregory of Nazianzus, Bishop and Theologian, 389
- 4 Elizabeth Ann Seton, Monastic and Educator, 1821
- 5 Sarah, Theodora, and Syncletica of Egypt, Desert Mothers, 4th – 5th century
- 6 THE EPIPHANY OF OUR LORD JESUS CHRIST
- 8 Harriet Bedell, Deaconess and Missionary, 1969
- 9 Julia Chester Emery, Missionary, 1922
- 10 William Laud, Archbishop of Canterbury, 1645
- 12 Aelred, Abbot of Rievaulx, 1167
- 13 Hilary, Bishop of Poitier, 367
- 14 Richard Meux Benson, Priest; and Charles Gore, Bishop, 1915 and 1932
- 17 Antony, Abbot in Egypt, 356
- 18 THE CONFESSION OF SAINT PETER THE APOSTLE
- 19 Wulfstan, Bishop of Worcester, 1095
- 20 Fabian, Bishop and Martyr of Rome, 250
Richard Rolle, 1349, Walter Hilton, 1396, Margery Kempe, c. 1440, Mystics
- 21 Agnes and Cecilia of Rome, 304 and c. 230, Martyrs
- 22 Vincent, Deacon of Saragossa and Martyr, 304
- 23 Phillips Brooks, Bishop of Massachusetts, 1893
- 24 Florence Li Tim-Oi, Priest, 1992
- 25 THE CONVERSION OF SAINT PAUL THE APOSTLE
Gregory of Nazianzus, see January 2
- 26 Timothy, Titus, and Silas, Companions of Saint Paul
- 27 John Chrysostom, Bishop of Constantinople, 407
- 28 Thomas Aquinas, Friar and Theologian, 1274
- 29 Andrei Rublev, Monk and iconographer, 1430
- 31 Marcella of Rome, Monastic and Scholar, 410

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- 1 Brigid of Kildare, (also known as Bride), Monastic, 523
- 2 THE PRESENTATION OF OUR LORD JESUS CHRIST IN THE TEMPLE
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- 5 The Martyrs of Japan, 1597
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- 8 Bakhita (Josephine Margaret Bakhita), Monastic, 1947
- 10 Scholastica, Monastic, 543
- 11 Theodora, Empress, c 867
- 13 Absalom Jones, Priest, 1818
- 14 Cyril and Methodius, Missionaries to the Slavs, 869, 885
- 15 Thomas Bray, Priest and Missionary, 1730
- 17 Janani Luwum, Archbishop and Martyr, 1977
- 18 Martin Luther, Theologian, 1546
- 19 Agnes Tsao Kou Ying, 1856; Agatha Lin Zhao, 1858; and Lucy Yi Zhenmei, Martyrs, 1862
- 20 Frederick Douglass, Prophetic Witness, 1895
- 22 Margaret of Cortona, Monastic, 1297
- 23 Polycarp, Bishop and Martyr of Smyrna, 156
- 24 SAINT MATTHIAS THE APOSTLE
- 25 Photini (The Samaritan Woman), c. 67
- 27 George Herbert, Priest, 1633
- 28 Anna Julia Haywood Cooper, 1964, and Elizabeth Evelyn Wright, 1904, Educators

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- 1 David, Bishop of Menevia, Wales, 544
- 2 Chad, Bishop of Lichfield, 672
- 6 John and Charles Wesley, Priests, 1791, 1788
- 7 Perpetua and Felicity, and their Companions, Martyrs, 202
- 9 Gregory, Bishop of Nyssa, 394
- 10 Harriet Ross Tubman, Social Reformer, 1913 [her own date]
- 12 Gregory the Great, Bishop of Rome, 604
- 13 James Theodore Holly, Bishop, 1911

- 15 Vincent de Paul, Priest and Louise de Marillac, Vowed Religious, 1660
- 17 Patrick, Bishop and Missionary of Ireland, 461
Cyril, Bishop of Jerusalem, 386
- 19 SAINT JOSEPH
- 20 Cuthbert, Bishop of Lindisfarne, 687
- 21 Thomas Ken, Bishop of Bath and Wells, 1711
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- 22 James De Koven, Priest, 1879
- 23 Gregory the Illuminator, Bishop of Armenia, 332
- 24 Oscar Romero, Archbishop, 1980, and the Martyrs of El Salvador
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- 28 James Solomon Russell, Priest, 1935
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- 1 Frederick Denison Maurice, Priest, 1872
- 2 James Lloyd Breck, Priest, 1876
- 3 Richard, Bishop of Chichester, 1253
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- 4 Martin Luther King, Jr., Civil Rights Leader and Martyr, 1968
- 6 Pandita Mary Ramabai, Prophetic Witness and Evangelist, 1922
- 7 Tikhon, Patriarch of Russia, Confessor and Ecumenist, 1925
- 8 William Augustus Muhlenberg, Priest, 1877
- 9 Dietrich Bonhoeffer, Theologian and Martyr, 1945
- 10 William Law, Priest, 1761
- 11 George Augustus Selwyn, Bishop, 1878
- 14 Zenaida, Philonella, and Hermione, Physicians, c 100
- 15 Damien, Priest, 1889; and Marianne Cope, 1918, Monastic
- 16 Peter Williams Cassey, Deacon, 1917, and Annie Besant Cassey, 1875
- 17 Kateri Tekakwitha, Prophetic Witness, 1680
- 19 Alphege, Archbishop of Canterbury and Martyr, 1012

- 21 Anselm, Archbishop of Canterbury, 1109
- 22 Hadewijch of Brabant, Poet and Mystic, 1109
- 23 Toyohiko Kagawa, Prophetic Witness in Japan, 1960
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- 7 Harriet Starr Cannon, Monastic, 1896
- 8 Dame Julian of Norwich, Monastic, c. 1417
- 11 Johann Arndt, 1621; and Jacob Boehme, 1624, Mystics
- 13 Frances Perkins, Prophetic Witness, 1965
- 15 Pachomius of Tabenissi, Monastic, 348
- 17 Thurgood Marshall, Public Servant, 1993
- 19 Dunstan, Archbishop of Canterbury, 988
- 20 Alcuin of York, Deacon and Abbot of Tours, 804
- 21 Lydia of Thyatira, Coworker with Paul
- 22 Helena of Constantinople, Protector of Holy Places, 330
- 24 Jackson Kemper, Missionary Bishop, 1870
- 25 Bede, Priest and Monk of Jarrow, 735
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- 1 Justin, Martyr at Rome, 167
- 2 Blandina and her Companions, The Martyrs of Lyons, 177
- 3 The Martyrs of Uganda, 1886
- 4 John XXIII (Angelo Giuseppe Roncalli), Bishop of Rome, 1963

- 5 Boniface, Archbishop of Mainz, Missionary and Martyr, 754
- 8 Melania the Elder, Monastic, 410
- 9 Columba, Abbot of Iona, 597
- 10 Ephrem of Nisibis [Edessa], Deacon, 37311
- 11 SAINT BARNABAS THE APOSTLE
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- 14 Basil the Great, Bishop of Caesarea, 379
- 15 Evelyn Underhill, Mystic and Writer, 1947
- 16 Joseph Butler, Bishop, 1753
- 17 Marina the Monk, Monastic, 5th century
- 18 Bernard Mizeki, Catechist and Martyr, 1896
- 19 Adelaide Teague Case, Educator, 1948
- 22 Alban, first martyr of Britain, c. 304
- 24 THE NATIVITY OF SAINT JOHN THE BAPTIST
- 26 Isabel Florence Hapgood, Ecumenist and Journalist, 1929
- 28 Irenaeus, Bishop of Lyons, c. 202
- 29 THE APOSTLES SAINT PETER AND SAINT PAUL

JULY

- 2 Moses the Black, ca. 400
Pauli Murray, Priest and Prophetic Witness, 1985
- 4 INDEPENDENCE DAY (United States of America)
- 6 Eva Lee Matthews, Monastic, 1928
- 8 Priscilla and Aquila, Coworkers with Paul
- 11 Benedict of Nursia, Abbot of Monte Cassino, 540
- 14 Argula von Grumbach, Scholar and Church Reformer, c. 1554
- 17 William White, Bishop of Pennsylvania, 1836
- 19 Macrina, Monastic and Teacher, 379
Adelaide Teague Case, Teacher, 1948
- 20 Elizabeth Cady Stanton, 1902; Amelia Bloomer, 1894; Sojourner Truth, 1883; and
Harriet Ross Tubman, 1913, Liberators and Prophets
Maria Skobtsoba, monastic and martyr, 1945
- 22 SAINT MARY MAGDALENE
- 23 John Cassian, Monastic and Theologian, 435

- 24 Thomas a Kempis, Priest, 1471
- 25 JAMES THE APOSTLE
- 26 Joachim and Anne, Parents of the Blessed Virgin Mary
- 27 William Reed Huntington, Priest, 1909
- 28 Johann Sebastian Bach, Composer, 1750
- 29 Mary, Martha and Lazarus of Bethany
- 30 William Wilberforce, Prophetic Witness, 1833
- 31 Ignatius of Loyola, Priest and Monastic, 1556

AUGUST

- 1 Joseph of Arimathea
- 3 Joanna, Mary, and Salome, Myrrh-bearing women
- 6 THE TRANSFIGURATION OF OUR LORD JESUS CHRIST
- 7 John Mason Neale, Priest, 1866
- 8 Dominic, Priest and Friar, 1221
- 9 Edith Stein (Teresa Benedicta of the Cross), Philosopher, Monastic, and Martyr, 1942
- 10 Laurence, Deacon and Martyr at Rome, 258
- 11 Clare, Abbess at Assisi, 1253
- 13 Jeremy Taylor, Bishop, 1667
- 14 Jonathan Myrick Daniels, Seminarian and Martyr, 1965
- 15 SAINT MARY THE VIRGIN, MOTHER OF OUR LORD
- 18 William Porcher DuBose, Priest, 1918
- 20 Bernard, Abbot of Clairvaux, 1153
- 24 SAINT BARTHOLOMEW THE APOSTLE
- 25 Louis, King of France, 1270
- 26 Thomas Gallaudet, 1902, and Henry Winter Syle, 1890, Priests
- 27 [Simeon Bachos, the Ethiopian Eunuch]
- 28 Augustine, Bishop of Hippo and Theologian, 430
- 29 The Beheading of Saint John the Baptist
- 30 Margaret Ward, 1588; Margaret Clitherow, 1586; and Anne Line, 1601, Martyrs
- 31 Aidan, Bishop of Lindisfarne, 651
David Pendleton Oakerhater, Deacon and Missionary, 1931 [actual date]

SEPTEMBER

- 2 The Martyrs of New Guinea, 1942
- 3 Phoebe, deacon
- 4 Paul Jones, Bishop, 1941
- 5 Katharina Zell, Church Reformer and Writer, 1562
- 6 Hannah More, Religious Writer and Philanthropist, 1833
- 7 Kassiani, Poet and Hymnographer, 865
- 8 The Nativity of the Blessed Virgin Mary
- 9 Constance, and Her Companions [Thecla, Ruth, Frances, Charles Parsons, LouisSchuyler], 1878
- 10 Alexander Crummell, Priest 1898
- 12 John Henry Hobart, Bishop, 1830
- 14 HOLY CROSS DAY
- 14 Cyprian, Bishop and Martyr of Carthage, 258
- 15 Catherine of Genoa, Mystic and Nurse, 1510
- 16 Ninian, Bishop in Galloway, c. 430
- 17 Hildegard, Mystic and Abbess of Bingen, 1179
- 18 Edward Bouverie Pusey, Priest, 1882
- 19 Theodore of Tarsus, Archbishop of Canterbury, 690
- 20 John Coleridge Patteson, Bishop, and his Companions, Martyrs, 1871
- 21 SAINT MATTHEW, APOSTLE AND EVANGELIST
- 22 Philander Chase, Bishop of Ohio and Illinois, 1852
[Episcopal Deaconesses]
- 23 Thecla of Iconium, Proto Martyr Among Women, c. 70
- 24 Anna Ellison Butler Alexander, Deaconess and Teacher, 1947
- 25 Sergius, Abbot of Holy Trinity, Moscow, 1392
- 26 Lancelot Andrewes, Bishop of Winchester, 1626
Euphrosyne/Smaragdus of Alexandria, Monastic, 5th century
- 28 Paula and Eustochium of Rome, Monastics and Scholars, 404 and c. 419
- 29 SAINT MICHAEL AND ALL ANGELS
- 30 Jerome, Priest and Monk of Bethlehem, 420

OCTOBER

- 1 Remigius, Bishop of Rheims, c. 530
Therese of Lisieux, Monastic, 1897
- 3 John Raleigh Mott, Ecumenist and Missionary, 1955
- 4 Francis of Assisi, Friar, 1126
- 6 William Tyndale, Translators of the Bible, 1536
- 7 Birgitta of Sweden, Mystic and Prophetic Witness, 1373
- 9 Robert Grosseteste, Bishop of Lincoln, 1253
- 10 Vida Dutton Scudder, Educator and Witness for Peace, 1954
- 11 Philip, Deacon and Evangelist
- 14 Samuel Isaac Joseph Schereschewsky 1906, and Channing Moore Williams, 1910, Bishops and Missionaries
- 15 Teresa of Avila, Nun, 1582
- 16 Hugh Latimer, Nicholas Ridley, Thomas Cranmer, Bishops and Martyrs, 1555
- 17 Ignatius, Bishop of Antioch and Martyr, c 115
- 18 SAINT LUKE THE EVANGELIST
- 19 Henry Martyn, Priest and Missionary, 1812
- 23 SAINT JAMES OF JERUSALEM, BROTHER OF OUR LORD
- 25 Tabitha (Dorcas) of Joppa
- 26 Alfred the Great, King of the West Saxons, 899
Elizabeth Cady Stanton, Scholar and Social Reformer, 1902
- 28 SAINT SIMON AND SAINT JUDE
- 29 James Hannington, Bishop, and his Companions, Martyrs, 1885
Mary of Qidun, Monastic, 4th century

NOVEMBER

- 1 ALL SAINTS
- 2 [All Souls/] All Faithful Departed
- 3 Richard Hooker, Priest, 1600
- 6 William Temple, Archbishop of Canterbury, 1944
- 7 Willibrord, Archbishop and Missionary, 739
- 8 Ammonius, Hermit, 4th century
- 10 Leo the Great, Bishop of Rome, 461
- 11 Martin, Bishop of Tours, 397

- 12 Charles Simeon, Priest, 1836
- 14 The Consecration of Samuel Seabury, 1784
- 15 Herman of Alaska, Missionary, 1837
- 16 Margaret, Queen of Scotland, 1093
- 17 Elizabeth, Princess of Hungary, 1231
Hugh, Bishop of Lincoln, 1200
- 18 Hilda, Abbess of Whitby, 680
- 19 Mechthilde of Hackeborn and Gertrude the Great, Mystics, c. 1300
- 20 Edmund, King of East Anglia, 870
- 22 Clive Staples Lewis, Apologist and Spiritual Writer, 1963
- 23 Clement, Bishop of Rome, c 100
- 24 Catherine of Alexandria, Barbara of Nicomedia and Margaret of Antioch, Martyrs c. 305
- 25 James Otis Sargent Huntington, Priest and Monk, 1935
- 26 Sojourner Truth, Liberator and Prophet, 1883
- 28 Kamehameha and Emma, King and Queen of Hawaii, 1864, 1885
- 30 SAINT ANDREW THE APOSTLE

DECEMBER

- 1 Charles de Foucauld, Monastic and Martyr, 1916
- 3 Francis Xavier, Missionary, 1552
- 4 John of Damascus, Priest, c. 760
Nicholas Ferrar, Deacon, 1637
- 5 Clement of Alexandria, Priest, c. 210
- 6 Nicholas, Bishop of Myra, c. 342
- 7 Ambrose, Bishop of Milan, 397
- 11 [Frederick Howden, Jr, Priest and Chaplain of the Armed Forces, 1941]
- 12 Francis de Sales, Bishop; Jane de Chantal, Monastic, Workers of Charity, 1622 and 1641
- 13 Lucy (Lucia), Martyr at Syracuse, 304
- 14 Juan de la Cruz (John of the Cross), Mystic, 1591
Elizabeth Evelyn Wright, Educator, 1906
- 15 Nino of Georgia, Missionary, c. 332
- 17 Dorothy L. Sayers, Apologist and Spiritual Writer, 1957
- 20 Katharina von Bora, Church Reformer, 1552
- 21 SAINT THOMAS THE APOSTLE

- 25 THE NATIVITY OF OUR LORD JESUS CHRIST
- 26 SAINT STEPHEN, DEACON AND MARTYR
- 27 SAINT JOHN, APOSTLE AND EVANGELIST
- 28 THE HOLY INNOCENTS
- 29 Thomas Becket, Archbishop of Canterbury, 1170
- 30 Frances Joseph Gaudet, Social Reformer, 1934

August 27: Simeon Bachos, the Ethiopian Eunuch, *Evangelist in Africa*

In the eighth chapter of the Acts of the Apostles, we find the story of Philip and the baptism of an unnamed Ethiopian Eunuch. In the second century, the bishop and theologian Irenaeus of Lyons referred to him as Simeon Bachos; this is the name by which this unidentified figure is known in many parts of the eastern church, including in the Ethiopian Orthodox Tewahedo church.

According to the Acts, he was familiar with the Hebrew scriptures, and his encounter with Philip took place as he traveled from Jerusalem, where he had worshipped at the temple. Some suggest that he was a Jewish convert, while others contend that he was a “Godfearer.” Regardless of his previous religious affiliation, scripture records him as the first African person to be baptized.

Simeon Bachos was a person of great prestige, serving the Candace, or Queen, as both chamberlain and treasurer. His status as a eunuch indicates that he was a member of a sexual minority, either a castrated male, a deliberately celibate male, or a gender non-conformist.

Ireneus describes Simeon Bachos’s life after baptism, “This man was also sent into the regions of Ethiopia, to preach what he had himself believed.” In the fourth century, the historian Eusebius wrote that “The Eunuch became an apostle for his people.” The tenth-century Synaxarion of Constantinople designates August 27 as the commemoration of Simeon Bachos.

As a person of a different race, ethnicity, and gender identification, Simeon Bachos stands at the intersection of multiple marginalized groups. His identity shows that the early church was able to transcend social categories in its evangelizing work and that the gospel’s message would spread to the ends of the earth and to every person. Simeon Bachos calls Christians to be fully inclusive and welcoming of all people, empowering them for ministry and leadership.

Collects

I Holy One of love, thou didst call thy servant Simeon Bachos to study thy Word and led him to the waters of baptism, making him thy evangelist to Ethiopia: give to us the grace to follow where thou leadest, overcoming the barriers that divide and diminish thy people, that we may behold thee in all thy glory; through our Savior and Lord Jesus Christ, who with thee and the Holy Spirit liveth and reigneth for ever and ever. Amen.

II Holy One of love, you called your servant Simeon Bachos to study your word and led him to the waters of baptism, making him your evangelist to Ethiopia: give us the grace to follow where you lead, overcoming the barriers that divide and diminish your people, that we may behold you in all your glory; through our Savior and Lord Jesus Christ, who with you and the Holy Spirit lives and reign for ever and ever. Amen.

Lessons and Psalm

Acts 8:26-40

Psalm 68:28-29, 31-35

Matthew 19:3-12

Preface of a Saint (1)

September 22: Episcopal Deaconesses

The Episcopal deaconess movement describes a ministry of women who were set apart for service by their bishops, beginning in 1857 and ending with the ordination of women as deacons, authorized by General Convention in 1970.

Episcopal deaconesses joined a wider, multi-denominational movement that began in Europe in the 19th century. Deaconesses ministered as nurses, teachers, chaplains, caregivers, administrators, fundraisers and missionaries; both within the U.S. and around the world. Episcopal deaconesses ministered both as individuals and as communities. They often served under difficult conditions, with little compensation, and always under gendered definitions. They ministered in times of peace and in times of war.

The bishop of Maryland set apart the first six deaconesses in the Episcopal Church on September 21, 1857. Four of their names are known: Adeline Blanchard Tyler, Evaline Black, Carrie Guild, and Catherine Minard. Other bishops soon followed suit. Thirty-two years later, the General Convention recognized the ministry of deaconesses canonically thanks to the efforts of Mary Abbot Emery Twing and William Reed Huntington.

Notable deaconesses over the 113-year timespan include Rebecca Hewitt, a caregiver, administrator and leader of deaconesses in Alabama during the Civil War; Jessie Carryl Smith, a World War I nurse in France and later missionary in Alaska; Jane Harris Hall, advocate for women in the New York theater industry in the early 20th century; Susan Trevor Knapp, dean of the New York Training School for Deaconesses and missionary in pre-World War II Japan; and the original staff of the Appleton Church Home in Georgia, Margaret Jennings and Sophjenlife Petterson, each a caregiver, formation leader, and head deaconess of the Appleton Church Home, and Mary Frances Gould, teacher, leader and facilitator of mission work throughout the Diocese of Georgia. (See also the individual commemorations for deaconesses Harriet Bedell on January 8, and Anna Alexander on September 24.)

With the establishment of formation programs in several states, and communities for their life and work, the number of deaconesses in the Episcopal Church grew, peaking in 1922 with 226 living deaconesses. When in 1970 women were admitted to ordination as deacons, the Church's deaconesses, perpetual deacons and transitional deacons were joined in a single order of deacons; and women were thus counted among clergy for the first time. As of September 2020, Priscilla Jean Wright is the last woman deacon living who was originally made a deaconess. She was set apart as a deaconess on June 18, 1964 in the Diocese of Los Angeles.

Some 500 Episcopal deaconesses blessed the Church and the world with their diverse ministries, and provided an example of courageous faithfulness that challenged later generations to recognize God's call to women.

Collects

I O God of love, we bless thee for calling and equipping the deaconesses of the Episcopal Church, who served thy people at risk or in need, at home and throughout the world. With grateful hearts we honor their hard work, perseverance, and leadership in following Jesus into places of suffering or hardship, injustice or un-championed hope. May we, like them, bear the

light of Christ to all people with humility and grace; through Jesus Christ our Lord, who liveth and reigneth with thee, in the unity of the Holy Spirit, one God, now and for ever. **Amen.**

II O God of love, we bless you for calling and equipping the deaconesses of the Episcopal Church, who served your people at risk or in need, at home and throughout the world. With grateful hearts we honor their hard work, perseverance, and leadership in following Jesus into places of suffering or hardship, injustice or un-championed hope. May we, like them, bear the light of Christ to all people with humility and grace; through Jesus Christ our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. **Amen.**

Lessons and Psalm

1 Corinthians 12:1-13

Psalm 34:1-8

Mark 9:33-41

Preface of a Saint (1)

December 11: Frederick Howden, Jr, *Priest and Chaplain of the Armed Forces*

Episcopal military chaplains care for their flock of men, women and children stationed in countries around the world, as well as bases in the US. In times of battle, chaplains often accompany their unit – only without any weapons – in order to provide pastoral care, sacramental rites and the comfort of prayer under extreme stress. They ably administer rites and logistical assistance in field hospitals and Veterans centers, National Guard postings, and frequently a parish at home. More than _____ Episcopal chaplains currently serve our Armed Forces.

The ministry of The Rev. Frederick “Ted” Howden, Jr, stands out among many heroic chaplaincies. He was twelve years old when his father was consecrated Bishop of the Missionary District of New Mexico and Southwest Texas, and the family moved to Albuquerque, New Mexico. His father ordained him Deacon at St. Clement’s Church in El Paso, Texas on June 10, 1928 and Priest, also at St. Clement’s, on January 13, 1929. Ted Howden immediately began to serve several congregations in New Mexico, traveling great distances between them.

When World War II broke out Fr. Howden held the rank of Captain in the New Mexico State Guard, a unit predominantly made up of Hispanic, Latino and Native American soldiers. He was the Chaplain to the 200th Coast Artillery when it was federalized and sent to the Philippines in September 1941. He walked across the hills, from battery to battery, holding open-air services and distributing candy, soap, and cigarettes he had foraged for the troops.

At the Fall of Bataan and Corregidor to Japanese forces in April 1942, Fr. Howden and his fellow soldiers were made prisoners of war and were forced to endure the Bataan Death March, during which some 18,000 died. During imprisonment in several prison camps, his heroism and faith were always apparent through the care he provided. Howden often gave his own portion of food to others whom he insisted needed it more. He died of dysentery and starvation-induced pellagra on December 11, 1942, and was buried by his men in a small cemetery in the shadow of the Mindanao jungle, about a mile from the camp. His family would not learn of his fate until June 1943. After the war, in 1948, his remains were reinterred in Albuquerque, New Mexico.

Fr. Ted Howden has been commemorated in the Diocese of the Rio Grande, particularly by veterans of the armed forces and their families, who have faced physical, spiritual and emotional harm, disabling injuries, and death itself, while in the service of our country. Recalling his self-sacrifice, the Church honors all who answer our Lord’s call to chaplaincy in the world’s most dangerous places.

Collects

I Almighty God, our sure defense: We give thee thanks for thy servant^[s] Frederick Howden, ^[N._____] and all military chaplains who provided comfort and inspiration in time of battle; and, following the example of Jesus the Good Shepherd, laid down their lives in the service of others. Inspire and strengthen us, also, for the duties of life still before us, that we may be faithful to the end; through the same Jesus Christ, our Savior and Lord. Amen.

II Almighty God, our sure defense: We give you thanks for your servant^[s] Frederick Howden, ^[N._____] and all military chaplains who provided comfort and inspiration in time of battle; and, following the example of Jesus the Good Shepherd, laid down their lives in the service of others.

Inspire and strengthen us, also, for the duties of life still before us, that we may be faithful to the end; through the same Jesus Christ, our Savior and Lord. Amen.

Lessons and Psalm

1 Corinthians

Psalm 18:1-6,18-20

John 10:11-18

Preface of a Saint (2)

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE ON THE CONSTITUTION AND CANONS

Membership

Committee of the whole

Mandate

Resolution 2018-A062 Amend Canon II.2.6-9

Resolution 2018-A063 Amend Article X of the Constitution of the Episcopal Church (First Reading)

Resolution 2018-C028 Amend Canon II.4

Resolution 2018-D072 Amend Title II Canon IV

Summary of Work

RESPONDING TO DIRECTION FROM GENERAL CONVENTION

The Subcommittee took direction from four resolutions of the 79th General Convention. During the 2018-2021 triennium, The Subcommittee on Constitution and Canons, addressed the following Resolutions:

Resolution 2018-A062 Amend Canon II.2.6-9

No action was taken at this time.

Resolution 2018-A063 Amend Article X of the Constitution of the Episcopal Church (First Reading)

We affirm that the Task Force on Liturgical and Prayer Book Revision has been given charge of the amendment to Article X of the Constitution of the Episcopal Church, and as such, the SCLM has taken no action at this time.

Resolution 2018-C028 Amend Canon II.4

After careful consideration by the SCLM, this resolution was Rejected.

Resolution 2018-D072 Amend Title II Canon IV

No action was taken at this time.

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE ON FORMATION

Membership

Mr. Thomas Alexander, <i>Co-Chair</i>	Arkansas, VII	2021
Mrs. Ellen Johnston, <i>Co-Chair</i>	Virginia, III	2021
The Rev. Paul Fromberg	California, VIII	2021

Mandate

Towards the end of the SCLM’s in-person meeting in October 2019, we discerned the need for purposeful dialogue between the SCLM and the wider Episcopal Church in the months approaching the General Convention. With new material for The Book of Occasional Services, new thorough translations of The Book of Common Prayer, and a substantial proposal for how to better organize the Calendar of the Church, we needed the opportunity to talk about some of these issues and to receive feedback before arriving at the floor of General Convention.

Summary of Work

Introduction

The Rev. Dr. Paul Fromberg, Chair of the SCLM, called for the creation of an additional subcommittee that would focus strictly on formation.

Originally, this new Subcommittee on Formation planned for an in-person “Gathering on Liturgical Formation” to be held in Houston, Texas in October 2020. In one way, this conference would be an opportunity for the SCLM to prepare the Episcopal Church for upcoming liturgical legislation to be seen at the General Convention. In another way, this conference would be an opportunity for liturgical leaders from around the Episcopal Church (both deputies and non-deputies) to gather together and share ideas.

We invited each bishop in the Episcopal Church to identify two persons from their diocese—persons with deep commitments to liturgy and with strong communication skills—to attend, bringing the voice of their diocese to the gathering and reporting back to their diocese what they learned.

Amidst COVID-19, that original plan was reorganized into an online conference, and therefore, we were able to waive registration fees entirely.

The Gathering on Liturgical Formation consisted of four webinar conversations, two held on Monday, October 19 and two held on Tuesday, October 20. Each webinar featured two guest

panelists, and the conversations were facilitated by the Rev. Dr. Paul Fromberg, Chair of the SCLM. Participants were able to submit questions for the panelists throughout each webinar, and the Zoom “chat” feature was available for sidebar conversations between participants. The SCLM chose the topics for the four webinars, trying to ground each of them in the initiatives of the General Convention in 2018.

WEBINAR 1: WHAT IS LITURGY FOR?

The first webinar was an introduction to the conference, focusing less on legislation and more on the approach to thinking about liturgy. The panelists were: the Rt. Rev. Mary Gray Reeves, Bishop Resigned of the Diocese of El Camino Real, and the Rt. Rev. Deon Johnson, Bishop of Missouri. The two bishops, one recently retired and one recently ordained, spoke to the missional nature of liturgy and why revision may eventually be necessary.

WEBINAR 2: THE CHURCH CALENDAR

The second webinar focused on the Calendar of the Church, because, at the next General Convention, the SCLM will propose some revisions to commemorations in Lesser Feasts and Fasts, 2018, a new suggested process for local communities developing commemorations, and a new plan for how to better organize the Calendar of the Church going forward. The panelists were: the Very Rev. Dr. James Turrell, Dean of the School of Theology at Sewanee in Sewanee, Tennessee, and Dr. Liza Anderson, Assistant Professor of Theology and Religious Studies at St. Scholastica College in Duluth, Minnesota. These two academics traced the history and theology of the calendar of the Episcopal Church and described the criteria for inclusion of new commemorations.

WEBINAR 3: THE TASK FORCE ON LITURGICAL AND PRAYER BOOK REVISION

The third webinar focused on the Task Force on Liturgical and Prayer Book Revision, specifically letting some of the Task Force members describe their work thus far, since the formation of the Task Force was one of the most significant actions pertaining to liturgy made by the General Convention in 2018. The panelists were: the Rt. Rev. Dr. J. Neil Alexander, Chair of the Task Force and Professor of Liturgy at the School of Theology at Sewanee, and the Rev. Dr. Cameron Partridge, member of the Task Force and Rector of St. Aidan’s Episcopal Church in San Francisco, California. The two panelists spoke to the origin of the Task Force, discussed expansive/inclusive language guidelines for new liturgies, and re-introduced the Episcopal Church to the Task Force’s website.

WEBINAR 4: THE BOOK OF COMMON PRAYER

The fourth and final webinar focused on The Book of Common Prayer, specifically on translation and issues of language and culture, because the SCLM will report to the next General Convention concerning the new translations of The Book of Common Prayer into Spanish, French, and Haitian Creole. The panelists were: the Rev. Dr. Juan Oliver, Custodian of The Book of Common Prayer and Chair of the SCLM’s Subcommittee on Translations, and the Rev. Jemonde Taylor, Rector of St.

Ambrose Episcopal Church in Raleigh, North Carolina. The two panelists discussed the ways in which our words, our languages can be full of meaning, but, occasionally, destructive to certain communities. Juan Oliver also reported on the ongoing process of translating The Book of Common Prayer into Spanish, French, and Haitian Creole.

SMALL GROUP DISCUSSIONS

On Wednesday, October 21, those designated diocesan representatives were invited to participate in a couple of Zoom “breakout room” sessions to discuss the plenary sessions and to connect with one another. They were placed into small groups, the conversations in which were facilitated by members of the SCLM. Fruitful conversations marked the end of the Gathering for Liturgical Formation.

Conclusion

The SCLM received a great amount of both affirming and constructive feedback, primarily through a series of surveys they sent to participants throughout the experience. From this feedback, the SCLM confirmed there is, indeed, a clear need in the Church for conversations about liturgy in this way. We are making plans to continue offering similar programs in the future, but on smaller scales and more regular frequencies, perhaps one webinar every few months. We are hopeful that these kinds of offerings will continue to enhance the conversation between the SCLM and the wider Episcopal Church while also enhancing those conversations between Episcopalians from different congregations and dioceses.

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE ON THE BOOK OF COMMON PRAYER

Membership

Canon Mark Childers, <i>Chair</i>	Rio Grande, VII	2021
The Rev. Stannard Baker	Vermont, I	2021
Mr. Joshua Floberg	North Dakota, VI	2021
The Rt. Rev. Carl Wright	Washington, III	2021
The Rev. Paul Fromberg, <i>Ex Officio</i>	California, VIII	

Mandate

Resolution 2018-A068 Plan for the Revision of the Book of Common Prayer

Resolution 2018-B010 Concerning the Service of the Church

Resolution 2018-D065 Use of Alternative Psalters in Public Worship

Resolution 2018-A217 Consultation of Common Revised Common Lectionary Daily Readings

Resolution 2018-B012 Marriage Rites for the Whole Church

Resolution 2018-D078 Authorize Holy Eucharist, Rite II (Expansive Language) for Trial Use

Summary of Work

RESPONDING TO DIRECTION FROM GENERAL CONVENTION

During the 2018-2021 triennium, The Subcommittee on The Book of Common Prayer, addressed the following Resolutions as presented to them by the 79th General Convention.

Resolution 2018-A068 Plan for the Revision of the Book of Common Prayer

We affirm that a Task Force on Liturgical and Prayer Book Revision has been created and that a report of their work during the 2018-2021 will be made to the 80th General Convention.

Resolution 2018-B010 Concerning the Service of the Church

After careful consideration by the SCLM, this resolution was Rejected.

Resolution 2018-D065 Use of Alternative Psalters in Public Worship

The resolution was discussed and Affirmed.

Resolution 2018-A217 Consultation of Common Revised Common Lectionary Daily Readings

After careful consideration by the SCLM, this resolution was Rejected.

Resolution 2018-B012 Marriage Rites for the Whole Church

No action was taken at this time.

Resolution 2018-Do78 Authorize Holy Eucharist, Rite II (Expansive Language) for Trial Use

At the 79th General Convention of The Episcopal Church the House of Bishops and House of Deputies both passed Resolution 2018-Do78, Authorize Holy Eucharist, Rite II (Expansive Language) for Trial Use, which provided expansive language for Eucharistic Prayers A, B, C, and D. The revisions of Eucharistic Prayers A, B, and D were approved. However, many deputies and bishops felt that Eucharistic Prayer C needed additional study. A subcommittee of the SCLM was charged with this work. The work of the subcommittee was not to replace the 1979 BCP Prayer C, which along with the rest of the '79 BCP was memorialized, but rather to craft and offer an alternative for the 80th General Convention to consider.

Members of the Subcommittee on The Book of Common Prayer determined that several issues were at play. The Subcommittee felt that it would be most helpful to invite contributions from the Episcopal Church through reaching out to Bishops and Deputies, through the BCP Facebook page, and using direct conversation with people known to SCLM members. The work was engaging and fascinating on many levels. As we talked with deputies, bishops, liturgists, and theologians, we garnered many helpful and thought-provoking responses including: ideas about expansive language, possibly adding a preface, moving away from dialogic structure, and reconfiguring the order of the Eucharistic Prayer (e.g., placement of institution narrative, anamnesis, oblation, epiclesis, etc.). We offered a four-column parallel table, so respondents could see the '79 BCP version, the 2018-Do78 version, the Anglican Church of Canada version, and a non-dialogic version prepared by a Subcommittee member. In order to garner even more responses, we made an additional request for comment and set up a Gmail account in late spring of 2019, with an August 31, 2019 due date for comments. We received about 50 responses, incorporating many helpful suggestions, including those of two theologian/liturgists who remembered and offered the changes that Howard Galley himself suggested.

It was clear from all the input we received that a large number of Episcopalians value the dialogic structure, feeling that it increases congregational involvement. Most people favored reconfiguring the order of the prayer, and some hoped for a non-dialogic version. Most of the respondents were also very fond of, and loyal to, the “space” language, as well as the phrase, “This fragile earth, our island home.” As a result of the many forms of input listed above, and the discussion that ensued when we brought our findings to the entire SCLM, the Subcommittee brought two Prayer C alternatives to the full Standing Commission in fall of 2019. The SCLM approved offering two Prayer C alternatives to GC 80: a dialogic version with expansive language – which re-configures the order and includes other changes; and a non-dialogic version with a fixed response. Additionally, it was felt that

the use of fixed responses in the non-dialogic version could also be presented in the form of a choral setting.

In the year since then, several congregations have used the dialogic version and a few additional changes were made, specifically adding a “people’s epiclesis.”

Proposed resolutions

A015 Authorize Holy Eucharist, Rite II, Prayer C (Expansive Language) for Trial Use

Supplemental Materials

Table of contents:

1. [Eucharistic Prayer C – Dialogic \(with rubrics\)](#)
2. [Eucharistic Prayer C – Fixed Responses \(with rubrics\)](#)

Eucharistic Prayer C – Dialogic (*with rubrics*)

In this prayer, the lines in bold are spoken by the People.

The Celebrant, whether bishop or priest, faces them and sings or says

[May] God be with you.

And also with you.

Lift up your hearts.

We lift them to the Lord.

Let us give thanks to the Lord our God.

It is right to give our thanks and praise.

Then, facing the Holy Table, the Celebrant proceeds

God of all power, Source and Sustainer of the Universe, you are worthy of glory and praise.

Glory to you for ever and ever.

At your command all things came to be: shining light and enfolding dark; the vast expanse of interstellar space, galaxies, suns, and this fragile earth, our island home.

By your will they were created and have their being.

From the primal elements you brought forth the human race, and blessed us with memory, reason, and skill.

You made us the stewards of your creation. But we turned against you, and betrayed your trust; and we turned against one another.

Have mercy, Lord, for we are sinners in your sight.

Again and again, you called us to return. Through prophets and sages you revealed your righteous Law. And in the fullness of time you sent your eternal Word, born of your servant Mary, to fulfill your Law, opening for us the way of freedom and peace.

By his blood, he reconciled us.

By his wounds, we are healed.

And therefore we praise you, joining with the heavenly chorus, with prophets, apostles, and martyrs, and with all those in every generation who have looked to you in hope, to proclaim with them your glory, in their unending hymn:

Celebrant and People

Holy, holy, holy Lord, God of power and might,
heaven and earth are full of your glory.

Hosanna in the highest.
Blessed is the one who comes in the name of the Lord.
Hosanna in the highest.

The Celebrant continues

At the following words concerning the bread, the Celebrant is to hold it, or lay a hand upon it; and at the words concerning the cup, to hold or place a hand upon the cup and any other vessel containing wine to be consecrated.

On the night he was betrayed Jesus took bread, said the blessing, broke the bread, and gave it to his friends, and said, "Take, eat: This is my Body, which is given for you. Do this for the remembrance of me."

After supper, Jesus took the cup of wine, gave thanks, and said, "Drink this, all of you: This is my Blood of the new Covenant, which is shed for you and for all for the forgiveness of sins. Whenever you drink it, do this for the remembrance of me."
Remembering now his work of redemption and offering to you this sacrifice of thanksgiving,
We celebrate Christ's death and resurrection as we await the day of his coming.

Therefore, O God, we who have been redeemed by Jesus Christ, and made a new people by water and the Spirit, now bring before you these gifts. Sanctify them by your Holy Spirit to be the Body and Blood of Jesus Christ our Savior. Sanctify us also, and let the grace of this Holy Communion make us one body, one spirit in Christ, that we may worthily serve the world in his name.

Risen Lord, be known to us in the breaking of the Bread.

God of our ancestors;
Redeemer and Mother of Israel;
God and Father of our Lord Jesus Christ: Open our eyes to see your hand at work in the world about us. Deliver us from the presumption of coming to this Table for solace only and not for strength; for pardon only and not for renewal.

Accept these prayers and praises, Almighty God, through Jesus Christ our great High Priest, to whom, with you and the Holy Spirit, your Church gives honor, glory, and worship, from generation to generation. *AMEN.*

Continue with the Lord's Prayer on p. 364

Eucharistic Prayer C – Fixed Responses (*with rubrics*)

In this prayer, the lines in italics are spoken by the People.

The Celebrant, whether bishop or priest, faces them and sings or says

The Lord be with you. *or* God be with you.

And also with you.

Lift up your hearts.

We lift them to the Lord.

Let us give thanks to the Lord our God.

It is right to give our thanks and praise.

Then facing the Holy Table, the Celebrant proceeds

It is right to give you thanks and praise,

O Lord, our God, sustainer of the universe.

Glory to you for ever and ever.

At your command all things came to be: shining light and enfolding dark; the vast expanse of interstellar space, galaxies, suns, the planets in their courses, and this fragile earth, our island home; by your will they were created and have their being. From the primal elements you brought forth the human race, and blessed us with memory, reason, and skill; you made us the stewards of creation.

Glory to you for ever and ever.

But we turned against you, and betrayed your trust; and we turned against one another. Again and again you called us to return. Through prophets and sages you revealed your righteous law. In the fullness of time you sent your Son, born of a woman, to be our Savior. He was wounded for our transgressions, and bruised for our iniquities. By his death he opened to us the way of freedom and peace.

Glory to you for ever and ever.

Therefore we praise you, joining with the heavenly chorus, with prophets, apostles, and martyrs, and with those in every generation who have looked to you in hope, to proclaim with them your glory, in their unending hymn:

Celebrant and People

Holy, holy, holy Lord, God of power and might,
heaven and earth are full of your glory.

Hosanna in the highest.

Blessed is the one who comes in the name of the Lord.

Hosanna in the highest.

The people stand or kneel.

At the following words concerning the bread, the Celebrant is to hold it, or lay a hand upon it; and at the words concerning the cup, to hold or place a hand upon the cup and any other vessel containing wine to be consecrated.

Blessed are you, Lord our God, for sending us Jesus, the Christ, who on the night he was handed over to suffering and death, took bread, said the blessing, broke the bread, gave it to his friends, and said, "Take, eat: this is my body which is given for you. Do this for the remembrance of me."

In the same way, after supper, he took the cup of wine; he gave you thanks, and said, "Drink this, all of you: this is my blood of the new covenant, which is shed for you and for all for the forgiveness of sins. Whenever you drink it, do this for the remembrance of me."

Remembering now his work of redemption, and offering to you this sacrifice of thanksgiving, we celebrate his death and resurrection, as we await the day of his coming.
Glory to you for ever and ever.

Therefore, we who have been redeemed by Jesus Christ, and made a new people by water and the Spirit, now bring before you these gifts. Sanctify them by your Holy Spirit to be the Body and Blood of Jesus Christ our Savior. Sanctify us also, and let the grace of this Holy Communion make us one body, one spirit in Christ, that we may worthily serve the world in his name.
Glory to you for ever and ever.

Pour out your Spirit upon the whole earth and make it your new creation.
Gather your Church together from the ends of the earth into your kingdom, where peace and justice are revealed, that we, with all your people, of every language, race, and nation, may share the banquet you have promised.

Through Christ, with Christ, and in Christ, all honor and glory are yours, creator of all.
Glory to you for ever and ever. AMEN.

And now, as our Savior Christ has
taught us, We are bold to say,

As our Savior Christ has
taught us, we now pray,

Continue with the Lord's Prayer on p. 364

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE ON THE BOOK OF OCCASIONAL SERVICES

Membership

The Very Rev. Dr. James Turrell, <i>Chair</i>	Bethlehem, III	2021
Ms. Martha Burford	Southwestern Virginia, III	2021
The Rt. Rev. Jeffrey Lee	Chicago, V	2021
Mr. Ellis Montes	Texas, VII	2021
The Rev. Dr. Juan M.C. Oliver	Long Island, II	2021
The Rev. Paul Fromberg, <i>Ex Officio</i>	California, VIII	

Acknowledgements

The Rev. Marcus Halley and the Rev. Peggy Lo also participated in meetings of this subcommittee.

Mandate

At the General Convention of 2018, Resolution 2018-A219 referred several portions of the proposed Book of Occasional Services 2018 for further revision: The Way of the Cross, On Maundy Thursday, When Members Leave a Congregation, several liturgies connected with church planting, and the Reaffirmation of Ordination Vows. Additionally, Resolution 2018-A283 directed the SCLM to provide additional pastoral rites, including Quinceañera and Presentación de un(a) Niño o Niña. Resolution 2018-C003 referred the Way of Light liturgy attached to the resolution for consideration for inclusion in the BOS. Finally, 2018-A218 directed the SCLM to gather feedback on the use of the rites in the proposed BOS 2018 that had been approved by General Convention.

Summary of Work

INTRODUCTION

Meetings

Tele/Web Conference Meetings: February 1, 2019; March 8, 2019; April 5, 2019; May 3, 2019; Jun 7, 2019; December 6, 2019; January 13, 2020; February 11, 2020; March 17, 2020; April 21, 2020; June 1, 2020; July 8, 2020; August 5, 2020; September 3, 2020.

In-Person Meetings: November 13, 2018; October 24, 2019.

The Subcommittee continues to adhere to the purpose and criteria for the BOS stated by the SCLM in the past two triennia.

Purpose of the BOS:

The Book of Occasional Services is a collection of liturgical and catechetical resources in support of the fundamental liturgical life of The Episcopal Church.

Criteria for Resources in the BOS:

Primarily, resources included in the BOS should:

1. Complement or supplement the BCP, but not duplicate the resources it contains;
2. Be consistent with the theological, sacramental, and liturgical ethos of the BCP;
3. Pertain to a specific occasion, need, or purpose that does not occur generally or frequently enough to warrant inclusion in the BCP;
4. Draw on liturgical materials that are already being broadly used in worshipping communities;

Secondarily, it is desirable that some of the resources included in the BOS:

1. Serve the needs, or reflect the liturgical expressions, of diverse populations within The Episcopal Church;
2. Be adaptable for use by laypersons or clergy in a variety of non-ecclesial settings.

We also held in mind that the Book of Occasional Services contains liturgical materials for public worship and that it is not intended as a compendium of materials primarily for private devotion.

Work Process

In order for the Subcommittee to accomplish this work, members formed working groups to collect, compose, and edit materials. These four working groups consisted of:

1. Rites for the Church Calendar and Pastoral Rites
2. Rites Related to Church Planting
3. Episcopal Services
4. Responding to 2018-A283

Working groups gathered materials, generated drafts, and refined texts before bringing them to the subcommittee as a whole, which in turn revised and refined the drafts before reporting them out to the full SCLM. Some of the working groups invited additional writers to contribute to their sections of the Book.

Gathering Resources

Members of the Subcommittee solicited resources that could be included in the revision from a variety of sources. Liturgical resources from various parts of the Anglican Communion were consulted, including the Anglican Church of Canada, the Church of England, the Church in the Province of the West Indies, the Church of the Province of Southern Africa, and the Anglican Church of Mexico.

Resources were gathered from dioceses and congregations including the Diocese of Chicago, the Diocese of Iowa, and the Diocese of Olympia.

Resources were also gathered from individuals. Those contacted included the Rev. Canon Anthony Guillén, Mr. Hugo Olaiz, the Rev. Dr. Winifred Vergara, the Rev. Dr. Bradley Hauff, the Rev. Ricardo Lopez, the Rev. Paul Sneve, Ms. Ayesha Mutope, the Rev. Gary Cox, the Rev. Jesus Olivera Camacho, the Rev. Fernando Hermoza, the Rev. Ephrem Gutierrez, and the Latino/Hispanic Ministries of the Episcopal Church Facebook group.

RESPONDING TO DIRECTION FROM GENERAL CONVENTION

The Subcommittee took direction from several resolutions of the 79th General Convention, asking for certain resources to be included in the BOS.

Resolution 2018-A219 Refer Portions of The Proposed Book of Occasional Services 2018

The subcommittee took seriously the direction to revise the referred portions of the BOS 2018, indicated in Resolution 2018-A219. It reviewed notes of participants in the committee of General Convention that had received the proposed BOS 2018, conferred with others, and tried to discern those elements of the referred rites that were thought to be problematic. It is difficult, of course, to read the mind of a legislative committee, and notes and individual recollections are at best a partial glimpse into the deliberations of a committee. Nevertheless, the revisions of these referred rites reflect both the best efforts to be responsive to the General Convention and the best judgment of the SCLM.

A Scriptural Way of the Cross

The Way of the Cross was revised by including an alternative Way of the Cross more closely based on stories from scripture, alongside the traditional version. Because many congregations will be attached to the traditional form, it seemed good to the Holy Spirit and to us to revise by way of addition, rather than subtraction.

On Maundy Thursday

The directions and the prefatory address for the foot-washing were gently revised to address what was perceived as a clericalist tone in the original. The directions concerning the Reservation of the Sacrament were revised lightly to encourage that devotions before the Sacrament not displace the focus on the Proper Liturgies of Maundy Thursday and Good Friday themselves.

When Persons Leave a Congregation

The title of this rite was revised to reflect that a participant in a congregation's life may not formally have become a "member" (through the canonical process outlined in Canon I.17.4), yet their departure might be of significance to the community and need to be ritualized. A prayer blessing the departing persons, to be used after the post-communion prayer, was added.

Church Planting Rites

The subcommittee gathered information on the use of the earlier forms of these rites. Based on that feedback and the best judgment of the subcommittee, the liturgical form for the Discernment of a Church Mission was dropped. The form for Commissioning a Church Planter, Missioner, or Mission Team was simplified, reflecting the idea that "All Christians are called to make Christ known as Savior and Lord and commissioned to participate in God's mission in their baptism." The Liturgy for the Opening of a New Congregation was simplified, to reflect the customary entrance rite for the Holy Eucharist. The rite for Setting Apart Secular Space for Sacred Use was similarly simplified, reflecting the ancient premise that space is sanctified by its use by the Christian assembly, rather than any arcane formula or rite. The Litany of God's Mission for the Church was gently revised, and its new title reflects a more contemporary understanding of the nature of mission. Most of the prayers formerly in the section titled, "A Variety of Church Planting Collects, Blessings and Other Prayers" were moved to the section "Commissioning a Church Planter, Missioner or Mission Team," alongside others. The separate rite, "Discernment for a New Church Mission" was deleted, it being the belief of the SCLM that the proper work of discernment is not a liturgical form per se, and that existing structures of daily office and eucharist provide sufficient liturgical support for the ongoing work of collective discernment.

It should be noted that the SCLM has omitted the Spanish and French translations of the church-planting rites because it is the intention of the SCLM that full translations of the entire BOS into both languages be available.

Reaffirmation of Ordination Vows

The inherited form, The Reaffirmation Vows, struggled under the weight of the disparate functions assigned to it. It was to serve for a gathering of clergy to recommit themselves to their ordination vows, for the reception of a priest ordained in another communion into the communion of this church, and for the restoration to ordained ministry of one who had been suspended. The text of the inherited rite addressed the first purpose; it provided directions for the adaptation of the rite to address the other two purposes. These represent three very different sorts of pastoral and ecclesial occasions, and the SCLM came to the conclusion that this was more ritual weight than the inherited rite could carry. The subcommittee lightly revised the form for Reaffirmation of Ordination Vows and produced new rites: Reception as a Priest or Deacon and Restoration to the Ordained Ministry. Each of these new rites is designed for the nature of the occasion.

Reception as a Priest or Deacon

This liturgy begins with the one to be received vested according to their order. They are examined by the bishop, and then they sign the canonically required Declaration of conformity. Because this church's understanding of the nature of the ministry of each order may differ somewhat from that of other churches, the examination is fairly thorough. After the bishop verbally admits the one being received to their order, their reception is symbolically enacted as the bishop greets them at the Peace and they function according to their order at the eucharistic table.

Restoration to the Ordained Ministry

This liturgy uses the structure of the Penitential Order at the introduction to the rite, reminding all present of the imperfections of humankind. The rite includes, in the Examination, a brief summary of the work of the ordained and the canonically required Declaration of conformity. Restoration to the ordained ministry is verbalized by the bishop, but crucially it is also enacted at the exchange of the Peace, after which the restored clergyperson is vested and then functions according to their order at the eucharistic table.

Consecration of Chrism

In addition to these rites referred for revision, the subcommittee revised the form for Consecration of Chrism Apart from Baptism. While the preferred practice, reflected in the Book of Common Prayer, is to consecrate chrism directly before its use, when the bishop baptizes in the local congregation during her visitation, there are occasions when the bishop may choose to consecrate chrism apart from baptism. The inherited form inserted a prayer after the post-communion prayer at the Holy Eucharist. The revision drafted by the subcommittee and proposed by the SCLM instead follows the structural pattern in the 1985 Book of Alternative Services of the Anglican Church of Canada and the 1995 Book of Common Prayer of the Church in the Province of the West Indies,⁽¹⁾ as well as the pattern in the early church, of consecrating chrism on the altar during the Great Thanksgiving, through a slight adaptation of the eucharistic prayer's text.⁽²⁾

Resolution 2018-A283 Multicultural Liturgies for Occasional Services

In the process of responding to the General Convention's resolution 2018-A283 to develop these resources, the SCLM, working with the Department of Ethnic Ministries, has canvassed and collected liturgies already being celebrated in congregations.

The proposed additions to the BOS include several rites originating in Latino cultures. There are several reasons to commend this: The BCP and BOS are currently in use by Latino/Hispanic congregations both in the US and Latin America. These rites honor the diverse traditions present expressing cultural and religious identity—for example, being Colombian and Anglican. At the same time, despite various attempts to solicit existing rites from other cultural communities, the SCLM received no such submissions. When members of the SCLM consulted with members of such

communities, pursuing inculturated liturgies, the response was often that there was no such rite in use.

The SCLM believes it important to collect rites actually in use in diverse communities within the church, rather than devising prototypes apart from the lived experience of congregations. We encourage further development by Chinese, Native American, Hawaiian, African American, and multicultural congregations. We suggest that this kind of development take place with the deep roots of liturgical inculturation in Anglicanism in mind: it was a concern of the reformers of the sixteenth century, in recent years, it has been increasingly addressed by the Lambeth Conference and the International Anglican Liturgical Consultation.⁽³⁾ As the Word was incarnated as a first-century Jewish man, the life of the Church incarnates in cultures to support everything that is good in them as well as confront their fallen aspects. In this way, the liturgy proclaims and embodies the nearness of the Kingdom of God directly and meaningfully to the participants.

For the rites that are provided in the BOS, the SCLM suggests that it is best for the congregation—or at least its liturgical leadership—to decide whether and when these rites are desired and appropriate. How the rite will fit into the liturgy, or how it may intersect with the liturgical calendar such as when a festive occasion falls within Lent, are also important considerations.

These rites should be planned and led with the involvement of congregants from the culture represented. The SCLM is ready to refer congregations to consultants and theological resources that may be of assistance.

The incarnation of our liturgical life, however, need not be limited to these rites. Even within the BCP, there is much room for cultural adaptation and expression: The place of worship, its decoration, the movements and gestures of ministers and people, the music and silences and the objects employed, as well as services such as the liturgies of Holy Week, “Lessons and Carols”, processions, the Daily Office, the prayers of the people, and many other forms, are already vehicles for the incarnation of worship. Historically, for example, there has been a greater tendency to incarnate funeral and wedding liturgies.

Finally, it is not appropriate to celebrate these rites when no one in the congregation belongs to the culture in which they originated. We recommend celebrating them as part of a deeper commitment to fully express the various cultures already present in a congregation.

Presentación de un[a] Niño o Niña (Presentation of a Child)

Because it developed originally as a celebration at two or three years of age of having survived the dangers of infant mortality, we have fashioned the rite with the general premise that it should keep the same sense of joyous celebration of life—not only of the child but of the family as a whole. The main challenge in this rite was not to make it look in any way like a baptism.

Quinceañera (The Celebration of Fifteen Years)

It seemed important to the subcommittee to keep in mind that a Quinceañera celebration is a rite of passage and should not resemble confirmation. Although allowance is made for the renewal of baptismal vows, this should not take place without a period of exploration of the Christian faith. At the same time, the rite not only celebrates the life of the person being honored, it also marks an important transition to a new stage of maturity expressed in the rite as the ability to read and interpret scripture through the giving of the Bible or lectionary to the quinceañera who has the option of proclaiming the first reading. Additionally, the rite is crafted to include all youths, regardless of gender identity or sexual orientation. Finally, it incorporates traditional elements like the entrance procession, the self-offering, and the giving and blessing of religious gifts to the quinceañera.

Resolution 2018-A218 The Proposed Book of Occasional Services 2018

The members of the subcommittee gathered feedback on the 2018 revision of the BOS through their informal networks, as well as social media.

Resolution 2018-C003 Way of Light Liturgy

The subcommittee reviewed the Way of Light liturgy that was referred to the SCLM. The “Way of Light” is a processional liturgy, similar to the Way of the Cross. It originated in a proposal by Father Sabino Palumbieri of Salesian University in Rome, and it was first observed in the 1990s. In 2001, the Roman Catholic Church’s Directory on Popular Piety and the Liturgy commended the Way of Light as “a potential stimulus for the restoration of a ‘culture of life.’” In the judgment of the SCLM, there was not sufficient cause to include this liturgy in the Book of Occasional Services, not least because the daily Eucharist is a more fitting and more traditional observance in the season of Resurrection.

End Notes

(1) BAS, 616-622, CPWI 423.

(2) The New rites for the BOS are found under the section "Supplemental Materials."

(3) The Lambeth Conference of 1988, III, 14. I.A.L.C. York Statement, 1989. See also Phillip Tovey, *Inculturation of Anglican Worship: Exploring the Eucharist*, Burlington Vt: Ashgate Publishing, 2004.

Proposed resolutions

Aoo6 Authorize the Book of Occasional Services, 2021

Supplemental Materials

Table of contents:

1. [Book of Occasional Services 2021 - New Rites Only](#)

Concerning the Service

The devotion known as the Way of the Cross is an adaptation to local usage of a custom widely observed by pilgrims to Jerusalem: the offering of prayer at a series of places in that city traditionally associated with our Lord's passion and death.

The number of stations, which at first varied widely, finally became fixed at fourteen. Of these traditional stations, eight are based directly on events recorded in the Gospels, with the remaining six based on inferences from the Gospel account or from pious legend.

In 1991, Pope John Paul II inaugurated a new set of fourteen stations, based strictly on events in the Gospels. The following form uses the same scriptural events, adding versicles drawn from scripture and collects drawn from the prayer book, previous editions of the Book of Occasional Services, and new compositions.

This form is appropriate either as a public service or as a private devotion, particularly on the Fridays of Lent, but it should not displace the Proper Liturgy of Good Friday.

Traditionally, the stations are made before a series of plain wooden crosses placed along the walls of the church or in some other convenient place. With each cross there is sometimes associated a pictorial representation of the event being commemorated.

The hymn *Stabat Mater* ("At the cross her vigil keeping" Hymnal 1982, 158) has frequently been associated with this service, but is not an integral part of it. Selected stanzas of this hymn may appropriately be sung at the entrance of the ministers, and (after the opening devotions before the Altar) as the procession approaches the first station.

In the form which follows, the Trisagion ("Holy God") is the chant recommended as the procession goes from station to station.

Alternatively, the Trisagion may be used to conclude each station, and stanzas of appropriate hymns sung as the procession moves. It is appropriate that all present take part in the procession. The procession should conclude at the altar, after the fourteenth station.

The presider at the service, whether clerical or lay, customarily leads the opening versicle at each station and reads the concluding Collect. The Readings (and the versicles which follow) are appropriately assigned to other persons.

A Scriptural Way of the Cross

A hymn or other song may be sung during the entrance of the ministers.

Opening Devotions

In the Name of the Father, and of the Son, and of the Holy Spirit. Amen.

Lord, have mercy.

Christ, have mercy.

Lord, have mercy.

Presider and People

Our Father, who art in heaven,
hallowed be thy Name,
thy kingdom come,
thy will be done,
on earth as it is in heaven.
Give us this day our daily bread.
And forgive us our trespasses,
as we forgive those
who trespass against us.
And lead us not into temptation,
but deliver us from evil.

Our Father in heaven,
hallowed be your Name,
your kingdom come,
your will be done,
on earth as in heaven.
Give us today our daily bread.
Forgive us our sins
as we forgive those
who sin against us.
Save us from the time of trial,
and deliver us from evil.

V. We will glory in the cross of our Lord Jesus Christ:

R. In whom is our salvation, our life and resurrection.

Let us pray. (Silence)

Assist us mercifully with your help, O Lord God of our salvation, that we may enter with joy upon the contemplation of those mighty acts, whereby you have given us life and immortality; through Jesus Christ our Lord. Amen.

The procession goes to the First Station.

First Station

Jesus in the Garden of Gethsemane (Matthew 26:36-41)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

Then Jesus went with them to a place called Gethsemane; and he said to his disciples, ‘Sit here while I go over there and pray.’ He took with him Peter and the two sons of Zebedee, and began to be grieved and agitated. Then he said to them, ‘I am deeply grieved, even to death; remain here, and stay awake with me.’ And going a little farther, he threw himself on the ground and prayed, ‘My Father, if it is possible, let this cup pass from me; yet not what I want but what you want.’ Then he came to the disciples and found them sleeping; and he said to Peter, ‘So, could you not stay awake with me one hour? Stay awake and pray that you may not come into the time of trial; the spirit indeed is willing, but the flesh is weak.’

V. All we like sheep have gone astray;

R. We have all turned to our own way,

Let us pray. (Silence)

Almighty God, whose Son Jesus entered the garden of suffering and confronted the agony of impending death: give strength and courage to the dying, that they may be comforted in their affliction and share in the hope of his resurrection, through the same Jesus Christ our Lord.

Amen

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Second Station

Jesus, Betrayed by Judas, Is Arrested (Mark 14:43-46)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

While Jesus was still speaking, Judas, one of the twelve, arrived; and with him there was a crowd with swords and clubs, from the chief priests, the scribes, and the elders. Now the betrayer had given them a sign, saying, 'The one I will kiss is the man; arrest him and lead him away under guard.' So when he came, he went up to him at once and said, 'Rabbi!' and kissed him. Then they laid hands on him and arrested him.

V. Let the lying lips be silenced

R. Which speak against the righteous

Let us pray. (Silence)

Almighty God, whose Son was betrayed by the kiss of a friend: forgive us our betrayals and denials of him, that we may be reconciled to him in his redeeming love, through the same your Son Jesus Christ our Lord. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Third Station

Jesus is condemned to death (Luke 22:66-71)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

When day came, the assembly of the elders of the people, both chief priests and scribes, gathered together, and they brought him to their council. They said, "If you are the Messiah, tell us." He replied, "If I tell you, you will not believe; and if I question you, you will not answer. But from now on the Son of Man will be seated at the right hand of the power of God." All of them asked, "Are you, then, the Son of God?" He said to them, "You say that I am." Then they said, "What further testimony do we need? We have heard it ourselves from his own lips!"

V. God did not spare his own Son,

R. But delivered him up for us all.

Let us pray. (Silence)

Almighty God, whose most dear Son went not up to joy but first he suffered pain, and entered not into glory before he was crucified: Mercifully grant that we, walking in the way of the cross, may find it none other than the way of life and peace; through Jesus Christ your Son our Lord. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Fourth Station

Jesus is Denied by Peter

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

Now Peter was sitting outside in the courtyard. A servant-girl came to him and said, 'You also were with Jesus the Galilean.' But he denied it before all of them, saying, 'I do not know what you are talking about.' When he went out to the porch, another servant-girl saw him, and she said to the bystanders, 'This man was with Jesus of Nazareth.' Again he denied it with an oath, 'I do not know the man.' After a little while the bystanders came up and said to Peter, 'Certainly you are also one of them, for your accent betrays you.' Then he began to curse, and he swore an oath, 'I do not know the man!' At that moment the cock crowed. Then Peter remembered what Jesus had said: 'Before the cock crows, you will deny me three times.' And he went out and wept bitterly.

V. My friend and my neighbor you have put away from me,

R. And darkness is my only companion

Let us pray. (Silence)

Most merciful God, you love everything you have made and reject no one who turns to you: look with compassion on our inconstancy and failings, strengthen our resolve to walk in your ways, and guide us to do as you would have us do; through your Son Jesus Christ our Lord. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Fifth Station

Jesus is Judged by Pilate (Mark 15:1-5, 15)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

As soon as it was morning, the chief priests held a consultation with the elders and scribes and the whole council. They bound Jesus, led him away, and handed him over to Pilate. Pilate asked him, 'Are you the King of the Jews?' He answered him, 'You say so.' Then the chief priests accused him of many things. Pilate asked him again, 'Have you no answer? See how many charges they bring against you.' But Jesus made no further reply, so that Pilate was amazed. So Pilate, wishing to satisfy the crowd, released Barabbas for them; and after flogging Jesus, he handed him over to be crucified.

- V. He was despised and rejected by others,
R. A man of suffering and acquainted with infirmity;

Let us pray. (Silence)

God of all power and might, whose Son stood mute before his accusers; helps us, we pray, to bear with patience the trials of this life, that we may share in the glory of his kingdom; through Jesus Christ our Lord. Amen.

Holy God,
Holy and Mighty,
Holy Immortal One,
Have mercy upon us.

Sixth Station

Jesus is Scourged and Crowned with Thorns (John 19:1-3)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

Then Pilate took Jesus and had him flogged. And the soldiers wove a crown of thorns and put it on his head, and they dressed him in a purple robe. They kept coming up to him, saying, 'Hail, King of the Jews!' and striking him on the face.

V. Upon him was the punishment that made us whole,

R. And by his bruises we are healed.

Let us pray. (Silence)

Lord God, whose blessed Son our Savior gave his body to be whipped and his face to be spit upon: Give us grace to accept joyfully the sufferings of the present time, confident of the glory that shall be revealed; through Jesus Christ your Son our Lord, who lives and reigns with you and the Holy Spirit, one God, for ever and ever. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Seventh Station

Jesus takes up his Cross (John 19:6, 15-17)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

When the chief priests and the police saw Jesus, they shouted, ‘Crucify him! Crucify him!’ Pilate said to them, ‘Take him yourselves and crucify him; I find no case against him.’ They cried out, ‘Away with him! Away with him! Crucify him!’ Pilate asked them, ‘Shall I crucify your King?’ The chief priests answered, ‘We have no king but the emperor.’ Then he handed him over to them to be crucified. So they took Jesus; and carrying the cross by himself, he went out to what is called The Place of the Skull, which in Hebrew is called Golgotha.

V. The Lord has laid on him the iniquity of us all;

R. For the transgression of my people was he stricken.

Let us pray. (Silence)

Almighty God, whose beloved Son willingly endured the agony and shame of the cross for our redemption: Give us courage to take up our cross and follow him; who lives and reigns for ever and ever. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Eighth Station

The Cross is laid on Simon of Cyrene (Mark 15:21)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

As they led Jesus away, they came upon a man of Cyrene, Simon by name, who was coming in from the country, and laid on him the cross to carry it behind Jesus.

V. Whoever does not bear his own cross and come after me

R. Cannot be my disciple.

Let us pray. (Silence)

Heavenly Father, whose blessed Son came not to be served but to serve: Bless all who, following in his steps, give themselves to the service of others; that with wisdom, patience, and courage, they may minister in his Name to the suffering, the friendless, and the needy; for the love of him who laid down his life for us, your Son our Savior Jesus Christ. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Ninth Station

Jesus meets the women of Jerusalem (Luke 23:27-28)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

There followed after Jesus a great number of the people, and among them were women who were wailing for him. But Jesus turning to them said, “Daughters of Jerusalem, do not weep for me, but weep for yourselves and for your children.”

V. Those who sowed with tears

R. Will reap with songs of joy.

Let us pray. (Silence)

Teach your Church, O Lord, to mourn the sins of which it is guilty, and to repent and forsake them; that, by your pardoning grace, the results of our iniquities may not be visited upon our children and our children’s children; through Jesus Christ our Lord. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Tenth Station

Jesus is nailed to the Cross (Luke 23: 33-34)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

When they came to the place which is called The Skull, there they crucified him; and with him they crucified two criminals, one on the right, the other on the left, and Jesus between them. And the scripture was fulfilled which says, "He was numbered with the transgressors."

- V. Christ entered into heaven itself, now to appear in the presence of God on our behalf,
R. To remove sin by the sacrifice of himself.

Let us pray. (Silence)

Lord Jesus Christ, you stretched out your arms of love on the hard wood of the cross that everyone might come within the reach of your saving embrace: So clothe us in your Spirit that we, reaching forth our hands in love, may bring those who do not know you to the knowledge and love of you; for the honor of your Name. Amen.

Holy God,
Holy and Mighty,
Holy Immortal One,
Have mercy upon us.

Eleventh Station

Jesus Promises His Kingdom to the Penitent Thief (Luke 23: 39-43)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

One of the criminals who were hanged there kept deriding him and saying, ‘Are you not the Messiah? Save yourself and us!’ But the other rebuked him, saying, ‘Do you not fear God, since you are under the same sentence of condemnation? And we indeed have been condemned justly, for we are getting what we deserve for our deeds, but this man has done nothing wrong.’ Then he said, ‘Jesus, remember me when you come into your kingdom.’ He replied, ‘Truly I tell you, today you will be with me in Paradise.’

V. He bore the sin of many

R. And made intercession for the transgressors.

Let us pray. (Silence)

O God, by the passion of your blessed Son you made an instrument of shameful death to be for us the means of life: Grant us so to glory in the cross of Christ, that we may gladly suffer shame and loss for the sake of your Son our Savior Jesus Christ; who lives and reigns with you and the Holy Spirit, one God, for ever and ever. Amen

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Twelfth Station

Jesus Speaks to his Mother and the Disciple (John 19:25-27)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

Standing near the cross of Jesus were his mother, and his mother's sister, Mary the wife of Clopas, and Mary Magdalene. When Jesus saw his mother and the disciple whom he loved standing beside her, he said to his mother, "Woman, here is your son." Then he said to the disciple, "Here is your mother." And from that hour the disciple took her into his own home.

V. God has made us his children by adoption and grace

R. And renews us with his Holy Spirit.

Let us pray. (Silence)

O God, who willed that when your Son was crucified, his Mother should suffer with him, grant that your Church may share in his sufferings and also know the power of his resurrection, who lives and reigns with you in the unity of the Holy Spirit, one God, for ever and ever. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Thirteenth Station

Jesus dies on the Cross (Luke 23: 44-46)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

It was now about noon, and darkness came over the whole land until three in the afternoon, while the sun's light failed; and the curtain of the temple was torn in two. Then Jesus, crying with a loud voice, said, 'Father, into your hands I commend my spirit.' Having said this, he breathed his last.

V. Christ for us became obedient unto death,

R. Even death on a cross.

Let us pray. (Silence)

O God, who for our redemption gave your only-begotten Son to the death of the cross, and by his glorious resurrection delivered us from the power of our enemy: Grant us so to die daily to sin, that we may evermore live with him in the joy of his resurrection; who lives and reigns now and for ever. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Fourteenth Station

Jesus is laid in the tomb (Matthew 27:57-60)

We adore you, O Christ, and we bless you:

Because by your holy cross you have redeemed the world.

When it was evening, there came a rich man from Arimathea, named Joseph, who also was a disciple of Jesus. He went to Pilate and asked for the body of Jesus. Then Pilate ordered it to be given to him. And Joseph took the body, and wrapped it in a clean linen shroud, and laid it in his own new tomb, which he had hewn in the rock. He then rolled a great stone to the door of the tomb and went away.

V. You will not abandon me to the grave,

R. Nor let your holy One see corruption.

Let us pray. (Silence)

O God, your blessed Son was laid in a tomb in a garden, and rested on the Sabbath day: Grant that we who have been buried with him in the waters of baptism may find our perfect rest in his eternal and glorious kingdom; where he lives and reigns for ever and ever. Amen.

Holy God,

Holy and Mighty,

Holy Immortal One,

Have mercy upon us.

Concluding Prayers before the Altar

Savior of the world, by your cross and precious blood you have redeemed us:

Save us, and help us, we humbly beseech you, O Lord.

Let us pray. (Silence)

We thank you, heavenly Father, that you have delivered us from the dominion of sin and death and brought us into the kingdom of your Son; and we pray that, as by his death he has recalled us to life, so by his love he may raise us to eternal joys; who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. Amen.

To Christ our Lord who loves us, and washed us in his own blood, and made us a kingdom of priests to serve his God and Father, to him be glory and dominion for ever and ever. Amen.

On Maundy Thursday

At the Foot-Washing

Where the ceremony of the washing of feet is observed, the whole assembly should be invited to take part. It is suggested that the presider and assistants wash the feet of the first persons to come forward, and that those whose feet are washed then, in turn, wash the feet of those who come after them, hereby giving all the opportunity to follow the example and command of Jesus.

If it is desired to introduce the ceremony of foot-washing by a brief address, the following may be used. It may be adapted as desired.

Fellow servants of our Lord Jesus Christ: On the night before his death, Jesus set an example for his disciples by washing their feet, an act of humble service. He taught that strength and growth in the life of the Kingdom of God come not by power, authority, or even miracle, but by such lowly service.

Therefore, I invite you who share in the royal priesthood of Christ, to come forward, that we may recall whose servant we are by following the example of our Master. Come remembering his admonition that what will be done for us is also to be done by us to others, for “a servant is not greater than his master, nor is one who is sent greater than the one who sent him. If you know these things, blessed are you if you do them.”

On Reserving the Sacrament

When the Sacrament is to be reserved for administration on Good Friday, it should be kept in a separate chapel or other place apart from the main sanctuary of the church, in order that on Good Friday the attention of the congregation may be on the bare, main Altar. If desired, the sacrament may be reverently carried to its place of reservation immediately before the Stripping of the Altar. Any devotional activities should not distract from the principal focus on the proper liturgies of Maundy Thursday and Good Friday.

On the Stripping of the Altar

If the custom of stripping the Altar is observed as a public ceremony, it takes place after the Maundy Thursday liturgy. It may be done in silence; or it may be accompanied by the recitation of Psalm 22, which is sung or said without Gloria Patri. The following antiphon may be said before and after the Psalm.

They divide my garments among them; they cast lots for my clothing.

When Persons Leave a Congregation

When persons leave a congregation, it is suitable that, on their last Sunday, the fact be mentioned before the Prayers of the People, and that they be prayed for by name in those Prayers. The Prayers may be written or adapted to suit the occasion, in accordance with the directions on p. 383 of the Book of Common Prayer.

If desired, the departing members may be sent forth in the following manner after the post communion prayer:

Presider

Dear Friends in Christ, we have been in companionship with N. (and N.) on our journey in faith. Now their time with us is drawing to a close, and so we send them forth to continue their journey.

Presider and People

O Lord, we give thanks for N.'s (and N.'s) time among us and for their contribution to our common life.

Bless them as they go forth;

be with those who leave and with us who stay;

and grant that all of us, by drawing ever nearer to you,

may always be close to each other in the communion of your saints.

All this we ask for the sake of Jesus Christ, your Son, our Lord.

Amen.

The service continues with the (blessing and) dismissal.

Concerning the Service

The Presentation of a child is a rite in use in some Latin cultures to give thanks for the life of a child. In the past it was considered that boys and girls at the age of two or three had overcome the dangers of infant mortality, and it was customary to mark the occasion with thanksgiving. Today it marks the transition from infancy to childhood and celebrated with much joy.

Presentation of a Child

When this rite occurs in the Holy Eucharist, a bishop or priest presides. On a Sunday, the assigned Collect and readings are used. The presider welcomes the family at the door of the church.

Presider

Welcome N. As the community of believers in Christ we join your family today in giving thanks to God for the years of life that he has already granted you.

The presider either leads the family into the church or follows last. An entrance hymn may be sung.

The Holy Eucharist begins as indicated by the Book of Common Prayer on page ____.

Presider The Lord be with you

People And also with you

Presider Let us Pray. (Silence)

Almighty and eternal God, look upon us with kindness and grant that trusting in your providence we may come to you with grateful hearts; through our Lord Jesus Christ your Son, who lives and reigns with you and the Holy Spirit for ever and ever. Amen.

First reading Deuteronomy 6:1- 7 (The great commandment)

Second Reading Ephesians 5, 2. 21. 6, 1-4 (Walk in the way of love)

Psalms 130 1-3

Gospel Mark 10: 13-16 (Let the children come to me.)

or

Matthew 18:2-6 (Whoever becomes like this child like this will be great in the Kingdom ...)

Sermon

On Sundays or major holidays, the Nicene Creed follows.

The Prayers of the People

This or any other form of intercessions may be used. A deacon or other assigned person leads the prayers. After each request the people may pray aloud. The presider says the final collect.

Leader Jesus taught us to call God Father, for he is love and full of tenderness: Let us therefore ask God for our needs and those of the whole world saying: Loving God, care for your children.

Leader Tender God, you loved the world so much that you gave your only Son for the salvation of all. Protect and heal all who are ill. Loving God, care for your children.

Leader Look with compassion upon the poor, the hungry and helpless, and on every child devoid of affection, that with the help of this Christian community they may always know your love, Loving God, care for your children.

Leader Creator of the universe, protect and heal all life in peril on this planet. Loving God, care for your children.

Leader Ruler of rulers, grant that the leaders of the nations, of this state, and city may work for the common good. Loving God, care for your children.

Leader Grant that each member of your Church, filled with the Holy Spirit, may fulfill the mission entrusted to us. Loving God, care for your children.

Leader You trusted Mary and Joseph with the loving care of your Son. Strengthen all parents and guardians to guide their children to the fullness of Christ. Loving God, care for your children.

Leader Welcome all those who have died into your glory. Loving God, care for your children.

Presider God, Father and Mother of every creature under heaven, look with compassion on all you have created, and by your providence, sustain and provide for all. Lead us all who celebrate here today to embrace all children who have not known love; through Jesus Christ our Lord, Amen.

The family brings the child(ren) to the presider.

The Blessing of the Child

If desired, before the Peace the presider may lay hands on each child, and then pray with these or similar words:

Presider Lord God, from the mouths of children you draw praise for your name: Look with love at this these your child whom we entrust to your providence; bless them, that they may live fully the faith we profess by the power of the Spirit, and by their goodness may be witnesses of your love before all the world; through Jesus Christ, our Lord. Amen.

The child, parents and godparents may be sprinkled with holy water.

The Eucharist continues as usual. The chil(dren), if baptized, receives communion.

Before the Dismissal the presider may bless the people with these or other words:

Presider May Christ Jesus, who dwelt with his parents in his home in Nazareth, dwell also with your families, protect you from all harm, and keep you united in love. And the blessing of Almighty God, Father, Son and Holy Spirit, be with you and remain with you always. Amen.

About the Service

In many Latino communities, it is customary to honor the fifteenth birthday of a young girl. Many cultures use this type of rite. In them, the quinceañera (fifteen year-old) passes into a new stage in their life. The event usually includes a celebration of the Holy Eucharist, followed by a party with food, music, and dancing. The Celebration of Fifteen Years varies substantially from place to place in the way it is observed.

Pastoral Observations: As families approach to ask for a rite of the quinceañera, we can offer a period of preparation for a number of months, either as a member of the youth group or as an individual congregant in the Eucharist. With the required preparation, the rite of the quinceañera can be a great opportunity to serve the entire family, also helping them to know our church community and our faith better.

This rite can be celebrated by people of any gender or sexual orientation (hence the potential change in the word quinceañera). It is also possible to celebrate the fifteen years of more than one person at the same time. It may also be celebrated at the principal Sunday eucharist, provided the assigned lectionary readings are proclaimed.

Processions: Generally, the person being honored has a companion for the ceremony. At the procession to the altar, oftentimes couples of youths process before the quinceañera and companion. They are followed by pairs of godparents and then the quinceañera, who is followed by their parents.

During the procession, music may be played or a hymn, psalm or anthem may be sung. The same applies for the procession out of the church. During the service hymns and songs may be sung. Sometimes, it is beneficial to rehearse them with the congregation before starting the rite.

The Celebration of Fifteen Years

This rite usually takes place during the Holy Eucharist. A bishop or priest presides. The rite begins with the entrance procession of the quinceañera and their companions. The presider can go before them or wait for them at the altar.

The penitential rite may be used.

After the Gloria or other song of praise:

Presider

Dear friends in Christ: We have gathered today to celebrate the fifteen years of N and give thanks to God for the gift of their life. We all, family and friends, happily celebrate this Eucharist, asking for God's continual protection and support for the rest of their life.

Presider The Lord be with you.

People And also with you.

Silence.

Presider

Gracious God, creator of life: N has come today grateful to celebrate the fifteen years you have given them. Support them in their faith, and strengthen them in their will so that, formed by your Word and sacraments, they might mature and become an example of Christian life. Through Jesus Christ, our Lord, who lives and reigns with you and the Holy Spirit, one God, now and forever. Amen.

Presider (handing the parish Bible or Lectionary from which the readings will be proclaimed) N, until this day, we have explained the Word of God to you in your home and in the Church. Now,

the time has come for you to interpret its meaning by yourself. This Bible (Lectionary) is a sign of your ability to proclaim the Word of God and interpret its meaning.

The quinceañera may take the book to the ambo/lectern and read the first reading.

The Word of God

Three readings are read.

The First Reading Jeremiah 1: 4-10 (the calling of Jeremiah) or
Judith 13: 18-20 (Judith, the brave woman)

The Second Reading Ephesians 1: 3-6 (Called by Christ before creation) or
Galatians 4: 4-7 (Divine heirs) or
Romans 12: 1-2 (Grateful offering to God).

Psalm 9: 1- 11.

The Gospel Matthew 25: 1-13 (The parable of the ten young women) or
Luke 10: 38-42 (Martha and Mary) or
Matthew 5: 14-16 (The light of the world) or
Juan 13: 31-35 (A new commandment)

If the rite is celebrated on a Sunday, the lectionary readings for the particular Sunday are used.

The Sermon

On Sunday, there follows the Nicene Creed

The Prayers of the People

This or other appropriate forms may be used.

Deacon or Leader Trusting in God's love for all, let us pray, saying: Lord, hear our prayer.

We pray for those most in need: the homeless, the hungry, the sick, and the troubled.

Lord, hear our prayer.

We pray for our planet earth: for the air, rivers and seas, mountains and valleys.

Lord, hear our prayer.

We pray for N and all the youth here present. Fill them with your grace and love, grant them the gift of happiness and strengthen them throughout their lives. Lord, hear our prayer.

We pray for their parent(s) (guardians): encourage and illuminate them in the education of their children. Lord, hear our prayer.

We pray for those who govern and hold authority in all the nations of the world.

Lord, hear our prayer.

We pray for the Church and the Christian community, that we all may be one.

Lord, hear our prayer.

We pray for our family and friends who have died and for all whom you have called to your embrace. Lord, hear our prayer.

Presider

O God, listen to the prayers of your people; and grant what we have asked of you in good faith for the glory of your Name. Through Jesus Christ our Lord. Amen.

Presentation of Offerings

The people, or their representatives, including, if desired, the quinceañera (and their companions), bring offerings to the altar—not only of bread, wine, and money, but also any

religious gifts for the quinceañera. The deacon or, in their absence, the priest receives them and places them on the altar. The presider may bless the gifts offered with these words:

Bless, gracious God, these gifts, expressions of the love and support of N's family and friends, and grant them deep gratitude for their life and for those who love them.

Self-Offering

The quinceañera may then say these or other words

I give you thanks, God of my life, for my fifteen years. With all my heart, I offer to serve you today and always. Help me to do your will, and strengthen me to proclaim your Kingdom of truth, justice, peace, and love through my actions and words. Through your Son, Jesus Christ, who lives and reigns with you and the Holy Spirit, one God, now and forever. Amen.

Renewal of Vows

Besides or in place of the self-offering, the quinceañera may renew their baptismal vows if they have prepared appropriately through a mature exploration of the meaning of their baptism. The presider can introduce the renewal with these or similar words

N, as a child, your parents (guardians) and godparents made you a member of the body of Christ through the waters of Baptism. They proclaimed the faith in your place and accepted the responsibility to form you as a Christian. Now, it is the time for you to accept this responsibility yourself and confess your faith maturely, before us all.

The renewal of baptismal vows can be found on p.____ of the Book of Common Prayer.

The blessed gifts are given to the quinceañera. "Las Mañanitas" may be sung.

Presider The peace of the Lord be always with you.

People And also with you.

The people may greet each other in the name of Christ.

The Holy Eucharist continues as laid out in the BCP. Any of the Eucharistic Prayers may be used.

Post-Communion Prayer

O God, giver of all that is true, noble, and lovely: We give you thanks for uniting us in these holy mysteries of the Body and Blood of your Son Jesus Christ. Grant by your Holy Spirit, that N, strengthened by your Spirit, may love their neighbors as themselves, and may be a living sign of your new Kingdom of truth, justice, peace, and love, through Jesus Christ our Lord. Amen.

The Eucharist ends in the typical fashion.

The Founding of a Church

Ground Breaking

Before the service, four stakes are set in the ground, at the corners of the proposed building. Three cords are prepared, two to extend diagonally from corner to corner, a third to enclose the space. A spade is placed at the site of the Altar.

The bishop, or a priest appointed by the bishop, is the Presider. Having vested nearby, the ministers, with the people, go in procession to the site of the building.

This Litany for the Church is sung or said during the procession.

God the Father, Creator of heaven and earth,

Have mercy on us.

God the Son, Redeemer of the world,

Have mercy on us.

God the Holy Spirit, Sanctifier of the faithful,

Have mercy on us.

Holy, blessed, and glorious Trinity, one God,

Have mercy on us.

O Christ the Rock, on which your people grow into a spiritual house;

Defend your Church, we pray.

O Christ the Vine, of which your people are the branches;

Defend your Church, we pray.

O Christ the Head of the Body, of which your people are the members;

Defend your Church, we pray.

O Christ our Prophet, you teach the way of God in truth;

Defend your Church, we pray.

O Christ our Priest, you offered yourself upon the Cross, and now make intercession for us to the Father;

Defend your Church, we pray.

O Christ our Sovereign, you reign over all the earth, and make us citizens of your heavenly realm;

Defend your Church, we pray.

O Christ, you sent the Holy Spirit upon the Church, clothing it with power from on high;

Defend your Church, we pray.

That we may be devoted to the Apostles' teaching and fellowship, to the breaking of bread and the prayers,

Lord, hear our prayer.

That we may make disciples of all nations, baptizing them in the Name of the Father, and of the Son, and of the Holy Spirit,

Lord, hear our prayer.

That you will fulfill your promise to be with us always, even to the ages of ages,

Lord, hear our prayer.

That you will sustain all members of your holy Church, that in our vocation and ministry we may truly and devoutly serve you,

Lord, hear our prayer.

That you will bless the clergy of your Church, that they may diligently preach the Gospel and faithfully celebrate the holy Sacraments,

Lord, hear our prayer.

That you will heal the divisions in your Church, that all may be one, as you and the Father are one,

Lord, hear our prayer.

Arise, O God, maintain your cause;

Do not forget the lives of the poor.

Look down from heaven, behold and tend this vine;

Preserve what your right hand has planted.

Let your priests be clothed with righteousness;

Let your faithful people sing with joy.

The Presider says

Let your continual mercy cleanse and defend your Church, O Lord; and, because it cannot continue in safety without your help, protect and govern it always by your goodness; through Jesus Christ our Lord, who lives and reigns with you and the Holy Spirit, one God, for ever and ever. Amen.

A hymn may be sung.

Then a Person appointed reads

Genesis 28:10-17

A sermon or address may follow.

While the following antiphon and psalm are being sung, persons appointed stretch two cords diagonally across the space, from the northeast to the southwest, and from the southeast to the northwest, securing them to the stakes, thus forming the Greek letter X (chi), the symbol both of the cross and of the name of Christ.

Antiphon (to be used before and after the Psalm)

Let us go to God's dwelling place; let us fall upon our knees before his footstool.

Psalm 132:1-9(10-19)

During the following antiphon and psalm, persons appointed stretch the third cord completely around the four stakes, enclosing the area. They move clockwise, beginning and ending at the southeast corner.

The ministers and people may follow in procession.

Antiphon

How wonderful is God in his holy places! the God of Israel, giving strength and power to his people! Blessed be God!

Psalm 48:1-3,7-13

Then the Presider, standing at the site of the Altar, says

Since faithful people desire to build a house of prayer, dedicated to the glory of God [and in honor of _____] [to be known as _____], on this ground, now marked with the symbol of Christ;

Then, taking the spade, and breaking the ground, the Presider continues

Therefore, I break ground for this building, in the Name of the Father, and of the Son, and of the Holy Spirit.

May the Gospel be preached, the Sacraments administered, and prayers and praises offered in this place, from generation to generation. Amen.

The Presider then says The Lord be with you.

People And also with you.

Presider Let us pray.

People and Presider

Our Father, who art in heaven,	Our Father in heaven,
hallowed be thy Name,	hallowed be your Name,
thy kingdom come,	your kingdom come,
thy will be done,	our will be done
on earth as it is in heaven.	on earth as in heaven.
Give us this day our daily bread.	Give us today our daily bread.
And forgive us our trespasses,	Forgive us our sins
as we forgive those	as we forgive those

who trespass against us.

And lead us not into temptation,

and deliver us from evil.

For thine is the kingdom,

and the power, and the glory,

for ever and ever. Amen.

who sin against us.

Save us from the time of trial,

but deliver us from evil.

For the kingdom, the power

and the glory are yours,

now and for ever. Amen.

V. How wonderful is God in his holy places!

R. Establish, O God, what you have wrought for us.

V. Be favorable and gracious to Zion:

R. Build up the walls of Jerusalem.

Presider Let us pray.

O Lord God of Israel, the heavens cannot contain you, yet you are pleased to dwell in the midst of your people, and have moved us to set apart a space on which to build a house of prayer: Accept and bless the work which we have now begun, that it may be brought to completion, to the honor and glory of your holy Name; through Jesus Christ our Lord, who lives and reigns with you in the unity of the Holy Spirit, one God, for ever and ever. Amen.

A Deacon or the Presider then dismisses the people.

Laying of a Cornerstone

If the laying of a cornerstone takes place before the building is erected, the following order may be observed.

1. A hymn or anthem is sung.
2. A suitable passage of Scripture, such as Ephesians 2:19-22, may be read.
3. An address follows.
4. An appropriate prayer, such as the Collect of the Patron or Title of the Church, is said.
5. The cornerstone is then laid, after which the Presider prays as follows

Let us pray.

Lord Jesus Christ, Son of the living God, you are the brightness of the Father's glory and the express image of his person, the one foundation and the chief cornerstone: Bless what we have now done in the laying of this stone. Be the beginning, the increase, and the consummation of this work undertaken to the glory of your Name; who with the Father and the Holy Spirit live and reign, one God, for ever and ever. Amen.

Trumpets may be sounded, and the Presider says

Praise the Lord, because the foundation of the house of the Lord is laid!

The People respond, with a loud voice

Alleluia! Alleluia! Alleluia!

Applause may follow.

A hymn is sung, after which the rite is concluded with a blessing and dismissal.

If the laying of a cornerstone takes place after the building is completed, it is suitable that it take place in the context of a celebration of the Holy Eucharist. After the homily, a hymn, psalm, or anthem is sung, during which all go in procession to the site of the ceremony. An appropriate prayer (such as the Collect of the Patron or Title of the Church) is said, after which the cornerstone is laid. The rite then continues with the Presider's prayer given above. During the hymn that follows, the procession returns to the church where the Liturgy continues with (the Creed and) the Prayers of the People.

Commissioning a Church Planter, Missioner or Mission Team

All Christians are called to make Christ known as Savior and Lord and commissioned to participate in God's mission in their baptism. Priests and deacons are further commissioned to proclaim the gospel and minister to God's people.

When a selected and trained church planter, missioner and/or mission team is to be sent forth by a diocese (and sponsoring congregation), to a designated location/congregation, the form for "Recognition of Ministries in the Church and the World" at page ____ in this volume may be used as a form to send them forth for this particular work.

To adapt the form for this purpose, after the presentation of the persons to be sent forth, the Celebrant uses one of the following collects.

O God the Creator and ruler of all things, your reign grows like a mustard seed into abundant life: Bless those who plant and tend the new life of your Church, that it may be a sign of your Kingdom, through Jesus Christ, our strength and our salvation. Amen.

Blessed God, you call forth light from darkness: Send the power of your Spirit upon your servants N. (and N.) as they carry your Gospel to _____. Fill them with your light, that they may shine with your radiance, drawing all to the brightness of your love and mercy; through Jesus, our Savior and true Light. Amen.

Living God, whose son our Savior Jesus is known to us in broken bread and wine poured out for reconciliation: Grant us courage to take up your mission; that we, too, may be broken, poured, and shared to feed a hungry world; through him who died and rose again, Jesus Christ our Lord. Amen.

Most Holy and life-giving God, the friends of Jesus carried your good news, each to a different place according to their gifts and calling. Bless N. (and N.) as they carry your word of love, making disciples for your service and building up your Church; through the power of your Spirit and in the Name of Jesus. Amen.

Lord Christ, you equipped and sent forth your friends to bring the Good News of salvation from Jerusalem into Judea and all the world: Be present as we send forth these friends and companions in your service, that your Kingdom may come with power in [place or name of the new church]; to the glory of your Name. Amen.

Eternal God, you have promised your salvation to all peoples, and have given us a vision of a great multitude around your throne, from all nations, tribes, and languages: Help us as we bring this vision into our time and place; go with those who now undertake your work in _____; and enable them to hear and to speak new words of hope and praise; through Jesus Christ, the living Word. Amen.

O Holy God, you raise up laborers for your harvest, sending them out as sowers of your Gospel and caretakers of new life: Bless these your servants in their work of planting and tending your Church in _____; equip them for service, enliven them with your joy, and help them remember and trust that it is you who will bring in the harvest; through Jesus Christ, the Savior of souls. Amen.

Concerning the Service

The opening service of a new congregation is a celebration for the members of the new community, but more importantly, an opportunity for them to show hospitality to those seeking a church home in the broader community.

It is important to choose a day appropriate for the culture surrounding the new mission—for example, the feast of the Epiphany is of particular significance in the Hispanic community and an effective date for a public launch. Days such as Palm Sunday, Easter, and Christmas are not recommended. Experience shows that dates between late August through the Last Sunday after Pentecost work well in most contexts.

The congregation is gathered to serve those coming for the first time, and should be mindful of the opportunities to proclaim the Gospel within the liturgy. The host members should be conscientious of the need for simplicity and clarity. It is important that a variety of persons participate in the leadership of the service.

This service assumes a Eucharistic context. It may be adapted to a service of the Word.

It is appropriate to adapt this rite to local custom, language, and idiom.

A Liturgy for the Opening of a New Congregation

The Eucharist begins in the usual manner. The Proper of the Day, or two or more of the following may be used.

From the Old Testament

Exodus 6:2-8 (I will take you as my people)

Ezekiel 11:17-20 (I will gather you from the peoples)

Ezekiel 36:23b-30 (The nations shall know that I am the Lord)

Between the readings, a Psalm, hymn, or canticle may be sung or said. Appropriate Psalms are 67 and 98.

From the New Testament

1 Corinthians 5:16-21 (So if anyone is in Christ, there is a new creation)

Hebrews 10:19-25 (Let us hold fast to the confession of our hope)

The Gospel

John 13:31-35 (As I have loved you, you also should love one another)

Matthew 11:2-6 (the blind receive their sight, the lame walk)

A sermon, homily or other reflection follows the readings.

The Nicene Creed

A Litany of God's Mission for the Church (page ____)

The service continues with the Peace.

Setting Apart Secular Space for Sacred Use

When a congregation gathers for worship in a facility such as a school, nursing home, “storefront,” or other secular space, there is no special rite for hallowing the space. When the people of God celebrate the presence of the Lord through the Eucharist, this sanctifies the space.

If desired, the first eucharist in such a space may be adapted by using the Litany of God’s Mission for the Church (at page ____) as the Prayers of the People. The third option for the dismissal (“Let us go forth into the world, rejoicing in the power of the Spirit.”) is appropriate.

A Litany of God's Mission for the Church

Holy God, in whom all things in heaven and earth have their being,
Have mercy on us.

Jesus the Christ, through whom the world is reconciled to the Father,
Have mercy on us.

Holy Spirit, whose glory fills the world and searches the depths of God,
Have mercy on us.

Holy Trinity, one God,
Have mercy on us.

From blind hearts and petty spirits, that refuse to see our need for your love,
Savior, deliver us.

From pride, self-sufficiency and the unwillingness to admit our own need of your compassion,
Savior, deliver us.

From discouragement in the face of pain and disappointment, and from lack of persistence and thoroughness,
Savior, deliver us.

From ignorance, apathy, and complacency that prevent us from spreading the Gospel,
Savior, deliver us.

O God, we pray for the gifts of ministry.

Inspire our minds with a vision of your kingdom in this time and place.

Hear us, O Christ.

Open our eyes, that we may see your glory in all creation.

Hear us, O Christ.

Open our ears, that we may hear from every mouth the hunger for hope and stories of refreshment.

Hear us, O Christ.

Open our lips, that we may tell in every tongue the wonderful works of God.

Hear us, O Christ.

Open our hearts, that we may discern the work to which you call us.

Hear us, O Christ.

Send us with your Good News into our neighborhoods, communities, and all parts of the world.

Hear us, O Christ.

Strengthen us, that we may each accomplish the work you give us to do.

Hear us, O Christ.

Sustain and encourage all who minister in your name in lonely, dangerous and unresponsive places.

Hear us, O Christ.

Open the hearts and hands of many to support your Church in this and every place.

Hear us, O Christ.

The Litany concludes with a collect, such as those provided in the Church Planting Liturgies or a collect for the Mission of the Church (BCP pages 257, 816).

Hymn suggestions for Church Planting liturgies

From The Hymnal 1982

- 302/303 Father, we thank thee who hast planted
304 I come with joy to meet my Lord
521 Put forth, O God, thy Spirit's might
527 Singing songs of expectation
528 Lord, you give the great commission (Rowthorn)
530 Spread, O spread thou mighty Word
537 Christ for the world we sing!
576/577 God is love, and where true love is From

From Wonder, Love, and Praise

- 741 Filled with the Spirit's power
752 There's a sweet, sweet Spirit
761 All who hunger gather gladly
763 As we gather at your table
778 We all are one in mission
779 The church of Christ in every age
780 Lord, you give the great commission (Abbot's Leigh)
782 Gracious Spirit, give your servants
787 We are marching in the light of God
794 Muchos resplandores
796 Unidos
811 You shall cross the barren desert
812 I, the Lord of sea and sky
819 Guide my feet Lord

From Lift Every Voice and Sing II

- 50 The angel said to Philip
120 There's a sweet, sweet Spirit in this place
159 How to reach the masses
160 This little light of mine
161 "Go preach my gospel," saith the Lord

De El Himnario

- 2 Es tiempo de que alabemos a Dios
9 Todo se hace para la gloria de Dios
14 Grandes y maravillosas son tus obras
19 Señor, ¿qué es nuestro templo?
33 Cantemos al amor de los amores
56 Hay un dulce espíritu
205 Iglesia de Cristo, tu santa misión
209 Es Cristo de su Iglesia
213 ¡Suelta la alegría!
216 Muchos resplandores
223 Somos uno en espíritu
243 Una espiga
246 Te ofrecemos, Padre nuestro
252 Somos pueblo que camina
303 He decidido seguir a Cristo
306 Yo, el Dios de cielo y mar
312 A este santo templo
313 Tú has venido a la orilla (también en WLP 758)
317 Caminemos a la luz de Dios

- 321 Dios hoy nos llama
322 Sois la semilla
324 Yo soy sal de mi tierra
327 Cristo te necesita
328 Criso está buscando obreros
332 ¿Quieres tú seguir a Cristo?
334 Tocando a tu puerta están
341 Grande gozo hay en mi alma hoy
342 En Jesucristo, puerto de paz
386 Vienen con alegría
400 De los cuatro rincones del mundo
439 Salmo 150 - Alabad a Dios en su santuario
440 Salmo 150 - ¡Aleluya, aleluya, aleluya!

Consecration of Chrism Apart from Baptism

Provision is made in the rite of Holy Baptism for the consecration of chrism in local congregations for use by a priest at baptisms that take place on subsequent occasions in the year.

The following form is intended for use when, because of the absence of candidates for Baptism, the consecration of chrism takes place at the liturgy of Confirmation (see the last rubric on page 419 of the Book of Common Prayer), or at some other time.

The olive oil to be consecrated should be prepared in a vessel large enough to be seen clearly by the congregation. Traditionally, a small amount of oil of balsam or other fragrant oil is added to it. The vessel of oil is brought forward in the offertory procession, received by a deacon or other minister, and then placed on the Altar.

In keeping with the custom of the ancient church, the oil to be consecrated is placed on the Altar, alongside the bread and wine, and it is consecrated by the inclusion of an additional text within the eucharistic prayer.

In Eucharistic Prayers A, B, and D in the Book of Common Prayer and in Prayers 1, 2, and 3 in *Enriching Our Worship* volume 1, the following text is inserted after the invocation of the Holy Spirit over the bread and wine and the people:

Send your Holy Spirit on this oil, that those who are sealed with this chrism in Baptism may share in the royal priesthood of Jesus Christ, who was anointed by the Holy Spirit to be the Savior and servant of all.

In Prayer A, this is inserted after “Sanctify us also that we may faithfully receive this holy Sacrament, and serve you in unity, constancy, and peace; and at the last day bring us with all your saints into the joy of your eternal kingdom.” In Prayer B, this is inserted after “Unite us to your Son in his sacrifice, that we may be acceptable through him, being sanctified by the Holy Spirit.” In Prayer D, this is inserted after “Lord, we pray that in your goodness and mercy your Holy Spirit may descend upon us, and upon these gifts, sanctifying them and showing them to be holy gifts for your holy people, the bread of life and the cup of salvation, the Body and Blood of

your Son Jesus Christ.” In Prayer 1, this is inserted after “Bring us into the everlasting heritage of your daughters and sons, that with [_____ and] all your saints, past, present, and yet to come, we may praise your Name for ever.” In Prayer 2, this is inserted after “Breathe your Spirit over the whole earth and make us your new creation, the Body of Christ given for the world you have made.” In Prayer 3, it is inserted after “Grant that we, burning with your Spirit’s power, may be a people of hope, justice and love.”

Because the blessing of oil of the sick is not reserved to the bishop and because the practice of blessing the oil in proximity to its use is a powerful sign to the congregation, oil of the sick is not blessed at the same occasion as the blessing of chrism.

If there is a need to consecrate chrism at a separate, diocesan service the following Proper may be used:

Collect

Almighty God, who by the power of the Holy Spirit anointed your Son to be Messiah and Priest for ever, grant that all whom you have called to his service may confess the faith of Christ crucified, proclaim his resurrection, and share in his eternal priesthood; who lives and reigns with you in the unity of the same Spirit, one God, now and for ever. Amen.

Isaiah 61:1-9

Psalm 89:20-29

Revelation 1:4-8

Luke 4:16-21

Reaffirmation of Ordination Vows

This form is intended for use at a celebration of the Eucharist upon an occasion when the clergy are gathered together with the Bishop.

If the Renewal of Ordination Vows takes place on Maundy Thursday, it should be done at a celebration of the Eucharist other than the Proper Liturgy of the day.

If it is desired to include a confession of sin, the liturgy begins with the Penitential Order in the Book of Common Prayer. After the absolution, the service continues with the Gloria, Kyrie, or Trisagion. Otherwise, the liturgy begins as follows.

The Word of God

A hymn, psalm, or anthem may be sung.

The people standing, the Bishop says:

Blessed be God: Father, Son, and Holy Spirit.

People: And blessed be his kingdom, now and for ever.

Amen.

or

Bishop: Blessed be the one, holy, and living God.

People: Glory to God for ever and ever.

In place of the above, from Easter Day through the Day of Pentecost

Bishop Alleluia. Christ is risen.

People The Lord is risen indeed. Alleluia.

In Lent and on other penitential occasions

Bishop Bless the Lord who forgives all our sins.

People His mercy endures for ever.

or

Bishop Blessed be the God of our salvation:

People Who bears our burdens and forgives our sins.

When appointed, the following hymn or some other song of praise is sung or said, all standing

Glory to God in the highest,

and peace to his people on earth.

Lord God, heavenly King,

almighty God and Father,

we worship you, we give you thanks,

we praise you for your glory.

Lord Jesus Christ, only Son of the Father,

Lord God, Lamb of God,

you take away the sin of the world:

have mercy on us;

you are seated at the right hand of the Father:

receive our prayer.

For you alone are the Holy One,

you alone are the Lord,

you alone are the Most High,

Jesus Christ,

with the Holy Spirit,

in the glory of God the Father. Amen.

On other occasions the following is used

Lord, have mercy.		Kyrie eleison.
Christ, have mercy.	or	Christe eleison.
Lord, have mercy.		Kyrie eleison.

or this

Holy God,
Holy and Mighty,
Holy Immortal One,
Have mercy upon us.

The Collect of the Day

The Bishop says to the people

The Lord be with you.

People And also with you.

Bishop Let us pray.

Almighty God, Source of all being, you have anointed your Son Jesus Christ with the power of the Holy Spirit to fulfill the promise of the scripture and proclaim your favor in all the world: anoint your Church with that same Spirit, that all who have been called to your purpose may bear witness to the good news of salvation; through Jesus Christ your Son our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. Amen.

Or this

Almighty God, you anointed your son Jesus Christ with the Holy Spirit and with power to bring to the world the blessings of your reign: anoint your Church with that same Spirit, that we who share in his suffering and his victory may bear witness to the gospel of salvation; through Jesus Christ your Son our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. Amen.

Or this

Almighty God, giver of all good gifts, in your divine providence you have appointed various orders of ministers in your Church: Give your grace, we humbly pray, to all who are called to any office and ministry for your people; and so fill them with the truth of your doctrine, and clothe them with holiness of life, that they may faithfully serve before you, to the glory of your great Name and for the benefit of your holy Church; through Jesus Christ our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. Amen.

The Lessons

The people sit. One or two Lessons, as appointed, are read.

1 Samuel 16:1–13

Psalm 89:19-30

2 Corinthians 4:5-15 or Philippians 2:3-11

The bishop may direct that other propers, appropriate to the occasion, be used.

The Reader introduces each lesson, saying

A Reading (Lesson) from _____ .

A citation giving chapter and verse may be added.

After each Reading, the Reader may say

The Word of the Lord.

People Thanks be to God.

or the Reader may say Here ends the Reading (Epistle).

Silence may follow.

A Psalm, hymn, or anthem may follow each Reading.

Then, all standing, the Deacon or a Priest reads the Gospel, first saying
The Holy Gospel of our Lord Jesus Christ
according to Luke.

Luke 10:1-11 or Luke 22:24–27[28-30]

People Glory to you, Lord Christ.

After the Gospel, the Reader says

The Gospel of the Lord.

People Praise to you, Lord Christ.

The Sermon

On Sundays and other Major Feasts there follows, all standing

The Nicene Creed

The Litany for the Mission of the Church

The Litany is found on page ____ of this volume.

Reaffirmation of Discipleship and Renewal of Ordination Vows

The Bishop addresses the people, saying

Beloved in Christ, through baptism we were all called to new life in the risen Lord. In baptism, we promised to proclaim by word and example the Good News of God in Christ; according to the gifts given to us, to carry on Christ's work of reconciliation in the world; and to take our place in the life, worship, and governance of the church. I call upon you, therefore, to reaffirm your commitment to follow the way of Jesus Christ.

Bishop Do you reaffirm the solemn promises and vows of Holy Baptism, renouncing all that seeks to corrupt and destroy the creatures of God, and promising to serve God faithfully as the Body of Christ in the world?

All We do.

Bishop Will you bear witness to Christ wherever you may be and, according to the gifts given you, carry on Christ's work of reconciliation in the world?

All We will, with God's help.

All are seated.

A lay person addresses the Bishop(s), saying

My brother/sister(s), you have been called to be one with the apostles in proclaiming Christ's resurrection and interpreting the Gospel, and to testify to Christ's sovereignty as Lord of all.

So I ask:

Lay Person Will you continue to guard the faith, unity, and discipline of the Church?

Bishop(s) I will, with God's help.

Lay Person Will you continue to celebrate and provide for the administration of the sacraments of the New Covenant?

Bishop(s) I will, with God's help.

Lay Person Will you continue to ordain priests and deacons and to join in ordaining bishops?

Bishop(s) I will, with God's help.

Lay Person Will you continue to be in all things a faithful pastor and a wholesome example for the entire flock of Christ?

Bishop(s) I will, with God's help.

The priests stand. The Bishop addresses the priests, saying

My colleagues, each of you has been called by God to work as a pastor, priest, and teacher, together with your bishop and fellow presbyters, and to take your share in the councils of the Church. And so I ask:

Bishop Will you continue to proclaim by word and deed, the Gospel of Jesus Christ?

Priests I will, with God's help.

Bishop Will you continue to fashion your life in accordance with its precepts?

Priests I will, with God's help.

Bishop Will you continue to love and serve the people among whom you work, caring alike for young and old, strong and weak, rich and poor?

Priests I will, with God's help.

Bishop Will you continue to preach, to declare God's forgiveness to penitent sinners, to pronounce God's blessing, to share in the administration of Holy Baptism and in the celebrations of the mysteries of Christ's Body and Blood, and to perform the other ministrations entrusted to you?

Priests I will, with God's help.

Bishop Will you continue to nourish Christ's people from the riches of his grace, and strengthen them to glorify God in this life and the life to come?

Priests I will, with God's help.

The deacons stand. The Bishop addresses the deacons, saying

My fellow workers, each of you has been called by God to a special ministry of servanthood directly under your bishop. And so I ask:

Bishop Will you continue to study the Holy Scriptures, to seek nourishment from them and to model your life upon them?

Deacons I will, with God's help.

Bishop Will you continue to make Christ's redemptive love known, by your word and example, to those among whom you live, and work, and worship?

Deacons I will, with God's help.

All clergy stand.

A Lay Person addresses the Bishop and clergy, saying

Dear friends in Christ, each of you is called to be a faithful servant for the ministry of God's Word and Sacraments. And so I ask:

Lay Person Will each of you continue to be to us an effective example in word and action, in love and patience, and in holiness of life?

Clergy I will, with God's help.

The Bishop then says

May Almighty God who has given us the will to do these things, give us the grace and power to accomplish them. Amen.

The Peace

The Bishop says

The peace of the Lord be always with you.

People And also with you.

The people greet each other in the name of the Lord.

At the Celebration of the Eucharist

The liturgy continues with the Offertory. Deacons prepare the Table.

The Bishop presides at the Lord's Table, joined by presbyters who share in the Breaking of the Bread.

If chrism is to be consecrated, it is done in accordance with the directions at page ___ in this volume, with the invocation of the Holy Spirit on the oil of chrism inserted in the appropriate place into the Eucharistic Prayer.

Reception as a Priest or Deacon

This form is intended for the reception of a priest or deacon ordained by a bishop in a church in the historic succession, but not in full communion with this Church. The priest or deacon begins the liturgy vested according to her/his order.

The Word of God

A hymn, psalm, or anthem may be sung.

The people standing, the Bishop says

Blessed be God: Father, Son, and Holy Spirit.

People And blessed be his kingdom, now and for ever.

Amen.

or

Bishop Blessed be the one, holy, and living God.

People Glory to God for ever and ever.

In place of the above, from Easter Day through the Day of Pentecost

Bishop Alleluia. Christ is risen.

People The Lord is risen indeed. Alleluia.

In Lent and on other penitential occasions

Bishop Bless the Lord who forgives all our sins.

People His mercy endures for ever.

or

Bishop Blessed be the God of our salvation:

People Who bears our burdens and forgives our sins.

When appointed, the following hymn or some other song of praise is sung or said, all standing
Glory to God in the highest,

and peace to his people on earth.

Lord God, heavenly King,

almighty God and Father,

we worship you, we give you thanks,

we praise you for your glory.

Lord Jesus Christ, only Son of the Father,

Lord God, Lamb of God,

you take away the sin of the world:

have mercy on us;

you are seated at the right hand of the Father:

receive our prayer.

For you alone are the Holy One,

you alone are the Lord,

you alone are the Most High,

Jesus Christ,

with the Holy Spirit,

in the glory of God the Father.

Amen.

On other occasions the following is used

Lord, have mercy.

Kyrie eleison.

Christ, have mercy. or

Christe eleison.

Lord, have mercy.

Kyrie eleison.

or this

Holy God,
Holy and Mighty,
Holy Immortal One,
Have mercy upon us.

The Collect of the Day

The Bishop says to the people

The Lord be with you.

People And also with you.

Bishop Let us pray.

Almighty God, giver of all good gifts, in your divine providence you have appointed various orders of ministers in your Church: Give your grace, we humbly pray, to all who are called to any office and ministry for your people; and so fill them with the truth of your doctrine, and clothe them with holiness of life, that they may faithfully serve before you, to the glory of your great Name and for the benefit of your holy Church; through Jesus Christ our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. Amen.

The Lessons

The people sit. One or two Lessons, as appointed, are read.

The Lessons and Psalm are those appointed for Ordination.

The Reader introduces each lesson, saying

A Reading (Lesson) from _____ .

A citation giving chapter and verse may be added.

After each Reading, the Reader may say

The Word of the Lord.

People Thanks be to God.

or the Reader may say Here ends the Reading (Epistle).

Silence may follow.

A Psalm, hymn, or anthem may follow each Reading.

Then, all standing, the Deacon or a Priest reads the Gospel, first saying

The Holy Gospel of our Lord Jesus Christ

according to _____.

People Glory to you, Lord Christ.

After the Gospel, the Reader says

The Gospel of the Lord.

People Praise to you, Lord Christ.

The Sermon

On Sundays and other Major Feasts there follows, all standing

The Nicene Creed

The Litany for the Mission of the Church

The Litany is found on page ____ of the Book of Occasional Services.

The appropriate form of Reaffirmation of Ordination Vows is used, depending on whether priests or deacons are being received. If both priests and deacons are being received, the priests are received first. If multiple candidates are being received in a single order, each is to have their

own presenters, and they may be presented together or in succession, as the bishop may direct. Thereafter, they are examined together.

Reaffirmation of Ordination Vows of a Priest

A lay person and a priest, and additional presenters if desired, standing before the Bishop, present the one to be received as a priest, saying

Bishop N., we present to you N.N., already ordained priest by a bishop in the historic succession, to be received among the clergy of this communion.

Bishop

Has she/he been selected in accordance with the canons of this Church? And do you believe her/his manner of life to be suitable to the exercise of this ministry?

Presenters

We certify to you that she/he has satisfied the requirements of the canons, and we believe her/him to be qualified to exercise the ministry of the presbyterate in this Church.

The Bishop says

My sister/brother/fellow servant of Christ, the work of a presbyter is to be pastor, priest, and teacher, together with your bishop and fellow presbyters, and to share in the councils of the Church.

It is a priest's task to proclaim by word and deed the Gospel of Jesus Christ; to care alike for young and old, strong and weak, rich and poor; to preach; to declare God's forgiveness to penitent sinners; to pronounce God's blessing; and to share in the administration of Holy Baptism and in the celebration of the mysteries of Christ's Body and Blood.

Do you here, in the presence of Christ and his Church, renew your commitment to this ministry?

Answer I do.

Bishop Will you be loyal to the doctrine, discipline, and worship of Christ as this Church has received them? And will you, in accordance with the canons of this Church,

obey your bishop and other ministers who may have authority over you and your work?

Answer I am willing and ready to do so; and I solemnly declare that I do believe the Holy Scriptures of the Old and New Testaments to be the Word of God, and to contain all things necessary to salvation; and I do solemnly engage to conform to the doctrine, discipline, and worship of the Episcopal Church.

The Priest then signs the above Declaration in the sight of all present.

Bishop Will you respect and be guided by the pastoral direction and leadership of your bishop?

Answer I will.

Bishop Will you continue to be diligent in the reading and study of the Holy Scriptures, and in seeking the knowledge of such things as may make you a stronger and more able minister of Christ?

Answer I will.

Bishop Will you endeavor so to minister the Word of God and the sacraments of the New Covenant, that the reconciling love of Christ may be known and received?

Answer I will.

Bishop Will you be a faithful pastor to all whom you are called to serve, laboring together with them and with your fellow ministers to build up the family of God?

Answer I will.

Bishop Will you continue to pattern your life [and that of your family, or household, or community] in accordance with the teachings of Christ, so that you may be a wholesome example to your people?

Answer I will.

Bishop Will you continue to persevere in prayer, both in public and in private, asking God's grace, both for yourself and for others, offering all your labors to God, through the mediation of Jesus Christ, and in the sanctification of the Holy Spirit?

Answer I will.

Bishop Upon these promises, I admit you to the exercise of the office of priest in this Church, recognizing your authority to preach the word of God and to celebrate the Holy Mysteries. God the Father, God the Son, and God the Holy Spirit continue to bless you and God's people through your ministry. Amen.

Reaffirmation of Ordination Vows of a Deacon

A lay person and a priest, and additional presenters if desired, standing before the Bishop, present the one to be received as a deacon, saying

Bishop N., we present to you N.N., already ordained deacon by a bishop in the historic succession, to be received among the clergy of this communion.

Bishop

Has she/he been selected in accordance with the canons of this Church? And do you believe her/his manner of life to be suitable to the exercise of this ministry?

Presenters

We certify to you that she/he has satisfied the requirements of the canons, and we believe her/him to be qualified to exercise the ministry of the diaconate in this Church.

The Bishop says

My fellow disciple of Christ, deacons share a special ministry of servanthood directly under the bishop.

It is the deacon's task to serve all people, particularly the poor, the weak, the sick, and the lonely; to study the Holy Scriptures and model your life upon them; to make Christ and his redemptive love known, by your word and example, to those among whom you live, and work, and worship; to interpret to the Church the needs, concerns, and hopes of the world; and to assist the bishop and priests in public worship and in the ministration of God's Word and Sacraments.

Do you here, in the presence of Christ and his Church, renew your commitment to this ministry?

Answer I do.

Bishop Will you be loyal to the doctrine, discipline, and worship of Christ as this Church has received them? And will you, in accordance with the canons of this Church, obey your bishop and other ministers who may have authority over you and your work?

Answer I am willing and ready to do so; and I solemnly declare that I do believe the Holy Scriptures of the Old and New Testaments to be the Word of God, and to contain all things necessary to salvation; and I do solemnly engage to conform to the doctrine, discipline, and worship of the Episcopal Church.

The Deacon then signs the above Declaration in the sight of all present.

Bishop Will you be guided by the pastoral direction and leadership of your bishop?

Answer I will.

Bishop Will you continue to be faithful in prayer, and in the reading and study of the Holy Scriptures?

Answer I will.

Bishop Will you look for Christ in all others, being ready to help and serve those in need?

Answer I will.

Bishop Will you continue to pattern your life [and that of your family, or household, or community] in accordance with the teachings of Christ, so that you may be a wholesome example to all people?

Answer I will.

Bishop Will you in all things seek not your glory but the glory of the Lord Christ?

Answer I will.

Bishop Upon these promises, I admit you to the exercise of the office of deacon in this Church, recognizing your authority to proclaim the word of God and to assist in the celebration of the Holy Mysteries. God the Father, God the Son, and God the Holy Spirit continue to bless you and God's people through your ministry. Amen.

The Peace

The Bishop says

The peace of the Lord be always with you.

People And also with you.

The Bishop now greets the newly received priest or deacon.

The clergy and people greet one another in the name of the Lord.

At the Celebration of the Eucharist

A newly received deacon prepares the bread and wine at the offertory.

A newly received priest stands at the altar with the bishop for the eucharistic prayer.

Restoration to the Ordained Ministry

This form is intended for use, in accordance with the canons, when a priest or deacon is restored to the ordained ministry after having been removed. The circumstances that led to the resignation, deposition, or long-term suspension of the priest or deacon will require pastoral sensitivity in the implementation of the rite.

A hymn, psalm, or anthem may be sung.

The people standing, the Bishop says

Blessed be God: Father, Son, and Holy Spirit.

People And blessed be his kingdom, now and for ever.

Amen.

or

Bishop Blessed be the one, holy, and living God.

People Glory to God for ever and ever.

In place of the above, from Easter Day through the Day of Pentecost

Bishop Alleluia. Christ is risen.

People The Lord is risen indeed. Alleluia.

In Lent and on other penitential occasions

Bishop Bless the Lord who forgives all our sins.

People His mercy endures for ever.

or

Bishop Blessed be the God of our salvation:

People Who bears our burdens and forgives our sins.

The Deacon or Bishop then says

Let us confess our sins against God and our neighbor.

Silence may be kept.

Minister and People

Most merciful God,

we confess that we have sinned against you

in thought, word, and deed,

by what we have done,

and by what we have left undone.

We have not loved you with our whole heart;

we have not loved our neighbors as ourselves.

We are truly sorry and we humbly repent.

For the sake of your Son Jesus Christ,

have mercy on us and forgive us;

that we may delight in your will,

and walk in your ways,

to the glory of your Name. Amen.

The Bishop stands and says

Almighty God have mercy on you, forgive you all your sins through our Lord Jesus Christ, strengthen you in all goodness, and by the power of the Holy Spirit keep you in eternal life. Amen.

The Word of God

When appointed, the following hymn or some other song of praise is sung or said, all standing

Glory to God in the highest,
and peace to his people on earth.

Lord God, heavenly King,
almighty God and Father,
we worship you, we give you thanks,
we praise you for your glory.

Lord Jesus Christ, only Son of the Father,

Lord God, Lamb of God,
you take away the sin of the world:

have mercy on us;
you are seated at the right hand of the Father:
receive our prayer.

For you alone are the Holy One,
you alone are the Lord,
you alone are the Most High,
Jesus Christ,
with the Holy Spirit,
in the glory of God the Father. Amen.

On other occasions the following is used

Lord, have mercy.		Kyrie eleison.
Christ, have mercy.	or	Christe eleison.
Lord, have mercy.		Kyrie eleison.

or this

Holy God,
Holy and Mighty,
Holy Immortal One,
Have mercy upon us.

The Collect of the Day

The Bishop says to the people
The Lord be with you.
People And also with you.
Bishop Let us pray.

Almighty God, giver of all good gifts, in your divine providence you have appointed various orders of ministers in your Church: Give your grace, we humbly pray, to all who are called to any office and ministry for your people; and so fill them with the truth of your doctrine, and clothe them with holiness of life, that they may faithfully serve before you, to the glory of your great Name and for the benefit of your holy Church; through Jesus Christ our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. Amen.

The Lessons

The Lessons and Psalm are those appointed for Ordination.

The people sit. One or two Lessons, as appointed, are read.

The Reader introduces each lesson, saying

A Reading (Lesson) from _____ .

A citation giving chapter and verse may be added.

After each Reading, the Reader may say

The Word of the Lord.

People Thanks be to God.

or the Reader may say Here ends the Reading (Epistle).

Silence may follow.

A Psalm, hymn, or anthem may follow each Reading.

Then, all standing, the Deacon or a Priest reads the Gospel, first saying

The Holy Gospel of our Lord Jesus Christ according to _____.

People Glory to you, Lord Christ.

After the Gospel, the Reader says

 The Gospel of the Lord.

People Praise to you, Lord Christ.

The Sermon

There follows, all standing

The Nicene Creed

The Litany for the Mission of the Church

The Litany is found on page ____ of this volume.

Reaffirmation of Ordination Vows

The Bishop, standing or seated in a chair placed before the Altar, addresses the priest or deacon to be restored, saying

My sister/brother/sibling in Christ Jesus, through baptism as the holy people of God, we are all called to represent Christ and the Church; and, according to the gifts given to us, to carry on Christ's work of reconciliation in the world, and to take our place in the life, worship, and governance of the Church.

We are called to proclaim his death and resurrection, to administer the Sacraments of the New Covenant which he sealed with his blood on the cross, and to care for his people in the power of the Spirit.

Will you be loyal to the doctrine, discipline, and worship of Christ as this Church has received them? And will you, in accordance with the canons of this Church, obey your bishop and other ministers who may have authority over you and your work?

Answer

I am willing and ready to do so; and I solemnly declare that I do believe the Holy Scriptures of the Old and New Testament to be the Word of God, and to contain all things necessary to salvation; and I do solemnly engage to conform to the doctrine, discipline, and worship of The Episcopal Church.

The Priest or Deacon then signs the above Declaration in the sight of all present.

Bishop

Do you here, in the presence of Christ and his Church, renew your commitment to your ministry, under the pastoral direction of your bishop?

Answer

I do.

Bishop

Do you reaffirm your promise to give yourself to prayer and the study of Holy Scriptures?

Answer

I do.

Bishop

Do you reaffirm your promise so to minister the Word of God and the Sacraments of the New Covenant that the reconciling love of Christ may be known and received?

Answer

I do.

Bishop

Do you reaffirm your promise to be a faithful servant of all those committed to your care, patterning your life in accordance with the teachings of Christ, so that you may be a wholesome example to your people?

Answer

I do.

The Bishop then says

I restore you to the exercise of the office of priest/deacon in this Church. God the Father, God the Son, and God the Holy Spirit bless you and God's people through your ministry. Amen.

The Peace

The Bishop stands and says

The peace of the Lord be always with you.

People And also with you.

The Bishop now greets the newly restored priest or deacon.

The clergy and people greet one another in the name of the Lord.

A newly restored deacon, properly vested, prepares the bread and wine at the offertory.

Having put on the vestments proper to the order, a newly restored priest stands at the altar with the bishop for the eucharistic prayer and shares in the Breaking of the Bread.

STANDING COMMISSION ON LITURGY AND MUSIC SUBCOMMITTEE FOR LITURGICAL TRANSLATION

Membership

The Rev. Dr. Juan M.C. Oliver, <i>Chair</i>	Long Island, II	2021
The Rev. Pierre-Henry Buisson	Arizona, VIII	2021
The Rev. Frederick Clarkson	East Carolina, IV	2021
The Rev. Dr. Luk De Volder	Convocation of Episcopal Churches in Europe, II	2021
The Rev. Nathanael Saint-Pierre	New York, II	2021
The Rev. Margarettte Saintliver	Haiti, II	2021
The Rev. Susan Saucedo Sica	Newark, II	2021
The Rt. Rev. Pierre Whalon	Convocation of Episcopal Churches in Europe, II	2021
The Rev. André Wildaine	Haiti, II	2021
The Rev. Paul Fromberg, <i>Ex Officio</i>	California, VIII	2021

Acknowledgements

The Rev. Juan M.C. Oliver, Ph.D., chair, is also the Custodian of the Prayer Book.

The French working group: The Revs. Luk De Volder, Pierre-Henri Buisson, and the Rt. Rev. Pierre Whalon, chair. The translator is Ms. Florence Lesur.

The Kreyol working group: The Revs. André Wildaine, Magarettie Saintliver, and Nathanael Saint-Pierre, chair. The translator is the Rev. Burnet Moise.

The Spanish working group: The Revs. Susan Sica, Frederick Clarkson, and Juan Oliver, chair. The translator is Mr. Hugo Olaiz.

Mandate

Resolution 2018-A070 Translation of the Book of Common Prayer

Resolution 2018-C024 Translations of Book of Common Prayer

Summary of Work

RESPONDING TO DIRECTION FROM GENERAL CONVENTION

The Subcommittee took direction from several resolutions of the 79th General Convention, which mandated new translations, and provided a budget of \$201,000. It also called for the creation of the Task Force for Liturgical Translations.

Introduction

The Task Force for Liturgical Translations, a subcommittee of the SCLM, was envisioned as early as 2017 in order to implement canonical changes made in 2012 to improve the quality of translations of liturgical materials. It began its work soon after the General Convention of 2018, meeting in person in January 2019 and chaired by the Custodian of the BCP. Its main work this triennium has been the development of new translations of the Book of Common Prayer 1979 into Spanish, French, and Haitian Kreyol, as well as new liturgical materials being submitted by the SCLM in this Blue Book.

Translation Process

The Custodian invited two native speakers of French and Haitian Kreyol to join him, a native Spanish speaker, to determine a general process for the task ahead, and form editorial teams made up of three native speakers to oversee and edit the work of the professional literary translators to be hired. The teams and their respective chairpersons met at the Church Center in January 2019 to develop a calendar for the process of translation and address related issues. The work was expertly supported by Ms. Maria Pacheco of the Church Center staff. Through the Communications Department of the Church Center, a general invitation to apply for translators' task was drafted and made widely available through all media. As applications began to arrive, each language team's lead evaluated them, consulted with others, and determined who should be interviewed.

Interviews of applicants as translators were conducted in the target language and included samples of the candidate's translation work and any literary works published. After choosing translators, contracts were reviewed by the Finance Office of the Church Center and signed. The contracts established translation protocols, rate, and the proviso that the contract could be annulled after the translator's first submission: Morning Prayer, Rite II.

Each language team was free to develop how it would work with the translator. In all cases, the team met regularly online to edit the translation, especially from a theological and liturgical perspective. They also rehearsed the translation, spotting difficult phrases to speak aloud, etc. At the time of this writing (December 2020), the teams are nearing completion of a first draft and plan to make it available to all Spanish, French, and Kreyol congregations in the US and abroad early in 2021 for review and feedback. Teams of published theologians and poets will also review it. After all feedback is gathered and analyzed it will be incorporated as much as possible into a final draft to be certified by the Custodian.

Each language team addressed different issues proper to that language such as the use of dynamic equivalences in the contemporary vernacular, syntactic and stylistic appropriateness, the “international” lexicon in Spanish and French, underlying Biblical translations to be used in the work, the educational level of most users, the gendered nature of Spanish and French with the specific challenges of expanding the gendered bias of the language to give equal weight to masculine and feminine pronouns, and how best to address this, and whether, when and how to translate which Rite I liturgies into the specific language.

Translations of new materials submitted to the 80th General Convention.

Finally, the Task Force will be employing the same process to develop professional translations of all new liturgical materials being submitted in this book.

Resolution 2018-C024 Translations of Book of Common Prayer

The process and criteria for developing all liturgical translations was established by the 79th General Convention and carried out by the SCLM for the new translation of the Book of Common Prayer into Spanish, French, and Haitian Kreyol. We believe the process is sound and should be followed for the translations of *Enriching Our Worship* and the *Book of Occasional Services 2022* as requested by this resolution.

Resolution 2018-D078 Authorize Holy Eucharist, Rite II (Expansive Language) for Trial Use

The SCLM has taken the following actions in response to resolution 2018-D078: Developed a proposed revision of pages 355-382 of the Book of Common Prayer pursuant to Article X(b) of the Constitution for trial use until the completion of the next comprehensive revision of the Book of Common Prayer, and a revised Eucharistic Prayer C, in two possible versions; directed the Custodian of the Book of Common Prayer to ensure that following the coming Convention these revisions are provided to the church at no cost via electronic distribution, and ensured that dynamic equivalence is employed and that sensitivity to gender characterize the new translations of the BCP into Spanish, French and Haitian Kreyol as far as it is possible in gendered languages such as Spanish and French. Haitian Kreyol is not gendered.

Proposed resolutions

A005 Translations of *Enriching Our Worship* and the *Book of Occasional Services* into Spanish, French, and Haitian Kreyol

TASK FORCE REPORT

Task Force on Liturgical & Prayer Book Revision

All other Task Force reports, see Volume 3

TASK FORCE ON LITURGICAL & PRAYER BOOK REVISION

Membership

The Rt. Rev. J. Neil Alexander, <i>Chair</i>	Atlanta, IV	2021
The Rev. Dr. Nina Ranadive Pooley, <i>Vice-Chair</i>	Maine, I	2021
The Rev. Matthew Mead, <i>Secretary</i>	New York, II	2021
Dr. Mark Ardrey-Graves	North Carolina, IV	2021
Mr. Ron Braman	Idaho, VIII	2021
The Very Rev. Samuel G. Candler	Atlanta, IV	2021
The Rt. Rev. Brian Cole	East Tennessee, IV	2021
Mr. Christopher Decatur	Ohio, V	2021
Mr. Craig Dressler	Northwestern Pennsylvania, III	2021
Ms. Joan Geiszler-Ludlum	East Carolina, IV	2021
The Rt. Rev. Wendell Gibbs	Michigan, V	2021
The Rt. Rev. Mary Glasspool	New York, II	2021
The Rt. Rev. Matthew A. Gunter	Fond du Lac, V	2021
The Rt. Rev. Deon Johnson	Missouri, V	2021
Mr. Adrián Linares-Palacios	Puerto Rico, IX	2021
The Rt. Rev. Dorsey McConnell	Pittsburgh, III	2021
The Rev. Dr. Ruth Meyers	California, VIII	2021
The Right Rev. Hector Monterroso	Texas, VII	2021
The Rev. Kathleen Moore	Northwestern Pennsylvania, III	2021
The Rev. Dr. Kevin Moroney	Pennsylvania, III	2021
The Rev. Zack Nyein	Atlanta, IV	2021
The Rev. Dr. Matthew S.C. Olver	Dallas, VII	2021
The Rev. Dr. Cameron Partridge	California, VIII	2021
The Rev. Dr. Ellen Francis Poisson, OSH	Upper South Carolina, IV	2021
The Rt. Rev. Brian N. Prior	Olympia, VIII	2021
Mr. James Scott	Los Angeles, VIII	2021
The Rt. Rev. George Wayne Smith	Missouri, V	2021
The Rt. Rev. Brian Thom	Idaho, VIII	2021
The Rev. Bryan Velez-Garcia	Puerto Rico, IX	2021
The Rev. Dr. Lauren Winner	North Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

The committee would like to acknowledge the Rev. Paul Fromberg, liaison to the Standing Commission on Liturgy and Music, who was a full participant in our meetings and very helpful in the production of our work.

Mandate

2018-A068 Plan for the Revision of the Book of Common Prayer

Resolved, the House of Deputies concurring, That the 79th General Convention, pursuant to Article X of the Constitution, authorize the ongoing work of liturgical and Prayer Book revision for the future of God's mission through the Episcopal branch of the Jesus movement. And, that it do so upon the core theological work of loving, liberating, life-giving reconciliation and creation care; and be it further

Resolved, that our methodology be one of a dynamic process for discerning common worship, engaging all the baptized, while practicing accountability to The Episcopal Church; and be it further

Resolved, That the 79th General Convention create a Task Force on Liturgical and Prayer Book Revision (TFLPBR), the membership of which will be jointly appointed by the Presiding Bishop and the President of the House of Deputies, and will report to the appropriate legislative committee(s) of the 80th General Convention, ensuring that diverse voices of our church are active participants in this liturgical revision by constituting a group with leaders who represent the expertise, gender, age, theology, regional, and ethnic diversity of the church, to include, 10 laity, 10 priests or deacons, and 10 Bishops; and be it further

Resolved, That this Convention memorialize the 1979 Book of Common Prayer as a Prayer Book of the church preserving the psalter, liturgies, The Lambeth Quadrilateral, Historic Documents, and Trinitarian Formularies ensuring its continued use; and be it further

Resolved, That this church continue to engage the deep Baptismal and Eucharistic theology and practice of the 1979 Prayer Book; and be it further

Resolved, That bishops engage worshiping communities in experimentation and the creation of alternative texts to offer to the wider church, and that each diocese be urged to create a liturgical commission to collect, reflect, teach and share these resources with the TFLPBR; and be it further

Resolved, That the TFLPBR in consultation with the Standing Commission on Structure, Governance, Constitution and Canons is directed to propose to the 80th General Convention revisions to the Constitution and Canons to enable The Episcopal Church to be adaptive in its engagement of future generations of Episcopalians, multiplying, connecting, and disseminating new liturgies for mission, attending to prayer book revision in other provinces of the Anglican Communion; and be it further

Resolved, That liturgical and Prayer Book revision will continue in faithful adherence to the historic rites of the Church Universal as they have been received and interpreted within the Anglican tradition of 1979 Book of Common Prayer, mindful of our existing ecumenical commitments, while also providing space for, encouraging the submission of, and facilitating the perfection of rites that will arise from the continual movement of the Holy Spirit among us and growing insights of our Church; and be it further

Resolved, That such revision utilize the riches of Holy Scripture and our Church's liturgical, cultural, racial, generational, linguistic, gender, physical ability, class and ethnic diversity in order to share common worship; and be it further

Resolved, That our liturgical revision utilize inclusive and expansive language and imagery for humanity and divinity; and be it further

Resolved, That our liturgical revision shall incorporate and express understanding, appreciation, and care of God's creation; and be it further

Resolved, That our liturgical revision take into consideration the use of emerging technologies which provide access to a broad range of liturgical resources; and be it further

Resolved, That the SCLM create a professional dynamic equivalence translation of The Book of Common Prayer 1979 and the Enriching Our Worship Series in Spanish, French, and Haitian Creole; and that the SCLM diversify the publication formats of new resources, liturgies and rites to include online publishing; and be it further

Resolved, That this church ensure that, at each step of the revision process, all materials be professionally translated into English, Spanish, French, and Haitian Creole, following the principles of dynamic equivalence and that no new rites or liturgical resources be approved by this church until such translations are secured; and be it further

Resolved, That the TFLPBR shall report to the 80th General Convention; and be it further

Resolved, That there being \$201,000 in the proposed budget for the translation of liturgical materials, that the Executive Council be encouraged to identify additional funds in the amount of \$200,000 to begin this liturgical revision.

Summary of Work

The Task Force on Liturgical and Prayer Book Revision, TFLPBR, was created by the 79th General Convention to initiate the work envisioned by Resolution 2018-A068. This report reflects the consensus of the Task Force on the work that was before it, summarizes the work that has been accomplished, and recommends to the 80th General Convention several resolutions for its consideration that are designed to sustain the direction set forth by 2018-A068 into the next triennium.

Due to the exigencies of the pandemic, the in-person meeting schedule originally planned for the triennium was severely truncated. As a result, much of the work had to be done by working groups and their efforts put before the whole of the Task Force for discussion, revision, and consent in online meetings. In order to facilitate this, we organized the Task Force into four working groups, as follows:

- Working Group I: Seek, Receive, Review
- Working Group II: Communications
- Working Group III: Constitution and Canons
- Working Group IV: Liturgical Revision and Creation

The bulk of the report that follows is organized around the tasks taken up by the Working Groups, including a description of their mandate and their principal accomplishments. Four resolutions for consideration by the 80th General Convention are included in the resolutions section that follows this summary report.

In addition to the work presented here by the Working Groups, all fully vetted and commended by the Task Force as a whole, it should be noted that the Working Groups also considered other aspects of the work of liturgical and Prayer Book revision that will be useful going forward. For example,

Working Group IV: Liturgical Revision and Creation spent considerable time examining the present 1979 Book of Common Prayer, noting such things as rubrics that might require reinterpretation, rites that may require either amplification or abbreviation, or noting particular pastoral concerns for which the present rites are insufficient. Given the massive detail of such an undertaking, and the constraints experienced by us all during this triennium, it was impossible for the whole of the Task Force to engage in that level of detail. Nonetheless, we believe that it is helpful material to be passed on to those who pick up this work going forward. Other such examples include identifying rites that are needed, continuing to evaluate rites that have been proposed, and exploring a variety of rich ideas that have been submitted.

Early in the process, *Working Group IV: Liturgical Revision and Creation* created a working document, based upon and interpreting 2018-A068, as a framework for guiding our work. The document was subsequently discussed and adopted by the whole Task Force and delineates our common understanding of the parameters of the work before us. That text is as follows:

Common Prayer: Worship in The Episcopal Church

Resolution 2018-A068 calls us to ‘memorialize’ the 1979 BCP, create new liturgies, and use emerging technologies. Thus, we propose the following:

1. That the 1979 BCP is the foundation and model for common prayer and liturgical development in The Episcopal Church;
2. That the 1979 BCP is maintained as an authorized text within a growing set of authorized liturgical materials for common prayer;
3. That the primary platform for our authorized liturgies be digital and online, organized according to the shape of the 1979 BCP, thus allowing for the authorization of more material than is possible within the limits of a printed book (with printed books remaining as an option);
4. That this new set of authorized liturgies be titled *Common Prayer: Worship in The Episcopal Church*, or something similar, that sets it within the BCP tradition;
5. That authorized liturgies will be consistent with the Trinitarian, Baptismal and Eucharistic theology of the 1979 BCP; and will be consonant with the directives of the General Convention with respect to liturgical language, inclusive and expansive language, and creation care; and will honor the Church’s increasing diversity;

6. That we continue the requirement of approval by two consecutive General Conventions for authorized rites included in *Common Prayer: Worship in The Episcopal Church*, and that we encourage the further development of alternative rites for use;

The above statement, as an interpretation of 2018-A068, has guided our work as a Task Force.

To facilitate the work of the Task Force, very early in our work together, *Working Group II: Communications* created a website both as a communications tool for the work of the Task Force, but also as a point of reference for materials created by the Task Force as well as a depository of liturgical materials already available for use in The Episcopal Church. The website will be described in greater detail in the report of *Working Group II: Communications* below, but all bishops and deputies are strongly encouraged to visit the website and familiarize themselves with the breadth of its content. Please visit: www.episcopalcommonprayer.org.

Report of Working Group I: Seek, Receive, and Review

Introduction

The 79th General Convention authorized the ongoing work of liturgical and Prayer Book revision and called for bishops to “engage worshipping communities in experimentation and the creation of alternative texts to offer to the wider church” (2018-A068). To assist dioceses and congregations in this work and to guide the work of liturgical revision, the Task Force on Liturgical and Prayer Book Revision developed principles, rooted in Anglican tradition, as received and interpreted in the 1979 Book of Common Prayer.

As background, the Task Force on Liturgical and Prayer Book Revision reviewed earlier work of the Standing Commission on Liturgy and Music, which identified qualities that make public prayer recognizably Anglican:

- It resonates with Scripture and proclaims the gospel.
- It is rooted in Anglican theological tradition.
- It has high literary value; it is beautiful according to accepted and respected standards.
- It uses the recurring structures, linguistic patterns, and metaphors of the 1979 Book of Common Prayer.
- It is formal, not casual, conversational, or colloquial.
- It is dense enough to bear the weight of the sacred purpose for which it is intended.

- It is metaphoric without being obtuse.
- It is performative: that is, it effects what it says.⁽¹⁾

In developing the principles, the Task Force took into account the directions for revision in Resolution 2018-A068:

- to “utilize the riches of Holy Scripture and our Church’s liturgical, cultural, racial, generational, linguistic, gender, physical ability, class and ethnic diversity in order to share common worship”;
- to “utilize inclusive and expansive language and imagery for humanity and divinity”;
- to “incorporate and express understanding, appreciation, and care of God’s creation”; and
- to “engage the deep Baptismal and Eucharistic theology and practice of the 1979 Prayer Book.”

The principles also draw upon the work of the International Anglican Liturgical Consultation⁽²⁾ as well as liturgical practices and Prayer Book revision in other provinces of the Anglican Communion.

In December 2019, the Task Force made a draft of the principles available on its website: www.episcopalcommonprayer.org and invited comments. It now presents these principles to General Convention and recommends that these guide the ongoing work of liturgical and Prayer Book revision:

Principles to Guide the Development of Liturgical Texts

Scriptural Foundations

- Christian liturgy is rooted in the riches of Scripture in a number of essential ways:
 - The Bible is read within the context of public liturgy and is proclaimed as the Word of God.
 - The language and content of Christian liturgy are in accord with Scripture and affirm beliefs that are congruent with Scripture as interpreted by the Church under the guidance of the Holy Spirit.⁽³⁾
 - The language of the rites draws on biblical vocabulary and phraseology in such a way as to indicate the rootedness of the language in Scripture. This extends to the actual quotation of biblical language within a liturgical text or the appropriation of verses or passages into a rite such that they become part of the

liturgy (for example, opening sentences in the Daily Offices), as distinct from the ordered reading of Scripture by way of a lectionary.

- Christian liturgy is itself a response to a directive in Scripture, such as Jesus' command to "do this" at the Last Supper or to baptize all nations in Matthew 28.
- Christian liturgy is scriptural when it uses images, metaphors, and prayer forms found there as the basis for praising and petitioning God as revealed in Jesus Christ.
- Christian liturgy is scriptural when it asks God to act in accordance with the ways in which Scripture reveals that God has acted in the past, as the classical collect formulas often do ("O God who [insert past action of God]...").

Anglican Theological Tradition

The Preamble to the Constitution of The Episcopal Church makes clear that the Book of Common Prayer sets forth "the historic Faith and Order" of this Church.

The Apostles' and Nicene Creeds summarize core Christian teachings that are recognized ecumenically. The nineteenth-century Chicago-Lambeth Quadrilateral, one of the Historical Documents contained in the 1979 BCP, identifies the Apostles' Creed "as the Baptismal Symbol" and the Nicene Creed as "the sufficient statement of the Christian Faith."⁽⁴⁾

Ritual Texts

Liturgy is a form of ritual, a genre that has certain characteristics:

- **Ritual texts are prayed aloud**, which means that they must be characterized by a poetic sensitivity and rhythm that make them comfortable to be prayed in unison and also move easily into the memory of those who use them.
- **Christian liturgy is dialogical by nature**, involving an assembly speaking to God in words of praise, thanksgiving, confession, intercession, and sometimes lament; God speaking to the assembly through scripture and in words of welcome, healing, absolution, and blessing; and members of the assembly speaking to one another, including verbal exchange between presider and congregation.
- **Christian worship builds up the body of Christ**, in language and ritual action intended to form the whole person.

Expansive and inclusive language.

We seek *to maximize rather than erase language from our liturgical lexicon.*

- **Language matters.** It shapes our sense of reality and is therefore crucial for our understanding of God and others. Through language we forge and maintain our relationships with God and one another.
- **Expansive Language.** Expansive language seeks to tell as much truth about God as we can, utilizing the full range of language available to us. It does not displace traditional language for God but uses additional metaphors. Of course, no human language can contain God. Even so, our theologies of creation, the Incarnation, and the Resurrection affirm that the material world, including language, is a means to understand God in a more faithful way.
- **Inclusive Language.** Our language often has built-in biases that exclude and harm some persons. When exclusive language is used, we fall short of our calling to respect all who are created in the image of God. By using inclusive language for humanity, we respect the dignity of every human being.

Worship and Culture

Christian worship is always celebrated in a local cultural context. The Nairobi Statement of the Lutheran World Federation identifies four ways in which worship is related dynamically to culture⁽⁵⁾, which we commend:

- *Transcultural.* “The resurrected Christ whom we worship, and through whom by the power of the Holy Spirit we know the grace of the Triune God, transcends and indeed is beyond all cultures.” Core elements of worship transcend cultural context, including baptism with water in the Triune name, the celebration of Eucharist, the proclamation of Scripture, intercession for the needs of the Church and the world, and use of the Lord’s Prayer and the ecumenical creeds, i.e., the Apostles’ and Nicene Creeds.
- *Contextual.* “Jesus whom we worship was born into a specific culture of the world. In the mystery of his incarnation are the model and the mandate for the contextualization of Christian worship.” In contextualization, the meanings and actions of worship are expressed in the language and forms of the local culture, where those are not contrary to Scripture. Elements from the local culture that are in harmony with Scripture may be added to enrich the worship.
- *Counter-cultural.* “Some components of every culture in the world are sinful, dehumanizing, and contradictory to the values of the Gospel. From the perspective of the Gospel, they

need critique and transformation. Contextualization of Christian faith and worship necessarily involves challenging of all types of oppression and social injustice wherever they exist in earthly cultures.”

- *Cross-cultural.* Sharing “elements of worship across cultural barriers helps enrich the whole Church” and strengthen our bonds as the Body of Christ. “Care should be taken that the music, art, architecture, gestures and postures, and other elements of different cultures are understood and respected when they are used by churches elsewhere in the world.”

Rites

1. **Holy Baptism.** “Holy Baptism is full initiation by water and the Holy Spirit into Christ’s Body the Church. The bond which God establishes in Baptism is indissoluble” (BCP p. 298). The International Anglican Liturgical Consultation has identified key characteristics of baptismal rites⁽⁶⁾:

- a. They are celebrated with the gathered community of faith and normatively take place within the context of the Holy Eucharist.
- b. They are for people of any age.
- c. The administration of water follows a profession of faith (and presumably catechesis in that faith) in Jesus Christ and the Holy Trinity and renunciation of all powers that rebel against this God.
- d. Baptism is administered in the Name of the Father, and of the Son, and of the Holy Spirit.
- e. “Baptism once received is unrepeatable and any rites of renewal must avoid being misconstrued as rebaptism.”

2. **The Holy Eucharist.** The action of the Eucharist has historically been marked by a structural shape within which specific kinds of praise and petition are articulated. The International Anglican Liturgical Consultation has outlined the following structure⁽⁷⁾:

- a. *Gathering and Preparation:* The gathering draws the assembly together as the Body of Christ, setting the tone for worship and preparing the assembly to hear the Word and participate in the Sacrament. In the 1979 BCP, the gathering includes an acclamation, a song or act of praise (for example, Gloria in excelsis, Kyrie, or Trisagion), and an opening collect. Historically, Anglican rites have included the Collect for Purity. Many newer rites, including the optional Penitential Order in the 1979 BCP, also have a general confession of sin as part of the preparation.

b. *Proclaiming and Receiving the Word of God*: The reading of at least two passages from Scripture, including one from the Gospels, has been normative, followed by an explication of the Scriptures in a sermon or homily. The proclamation of Scripture normally is followed by some response, often in psalmody, canticles, or hymns. The response to the Gospel is the sermon and the Creed. The 1979 BCP requires a sermon and calls for the Nicene Creed to be used on Sundays and other Major Feasts.

c. *Prayers of the People*: Essential to the gathering of God's priestly people is their communal intercession on behalf of the Church and the world, the living and the dead. Thanksgiving for the communion of saints is also common. The 1979 BCP lists areas that must be included in the intercessions (the universal Church, the Nation and all in authority, the welfare of the world, the concerns of the local community, the sick and suffering, and the departed) and the BCP invites congregations to craft their own intercessory prayers. In the 1979 BCP, following the pattern of earlier prayer books, a general confession and absolution follows the prayers of the people. The Peace provides a ritual expression of the unity of the Body of Christ as they come together to offer the Holy Eucharist.

d. *Celebrating at the Lord's Table*, which the 1979 BCP calls "The Holy Communion" (pp. 333, 361):

i. *Preparation*: The bread and wine are prepared for the celebration, and other gifts of the assembly are gathered and presented. In the 1979 BCP, the rubrics for Rite I and Rite II call this the "Offertory."

ii. *The Eucharistic Prayer*: The Eucharistic Prayer includes both thanksgiving and intercession. Eucharistic prayers in The Episcopal Church are shaped by a structure introduced from the Scottish Episcopal Church in the eighteenth century, which includes a number of identifiable features:

1. Opening dialogue ("The Lord be with you... give thanks and praise")
2. Praise and thanksgiving for creation and the work of redemption
3. The *Sanctus* and *Benedictus*
4. Praise and thanksgiving for creation and the work of redemption continue after the *Sanctus* and *Benedictus*
5. Institution Narrative (Jesus' actions at the Last Supper)

6. Anamnesis (remembrance of Christ's death and resurrection and anticipation of his coming again) with an explicit offering ("oblation") of the gifts of bread and wine
7. Epiclesis (invocation of the Spirit) over the bread and wine, joined to prayer for the gathered community
8. Anglican eucharistic prayers have also included a self-offering of the people and prayers for the acceptance of the offering, and occasionally more extensive supplications. In contemporary eucharistic prayers, this supplication typically includes an expression of hope, such as participation in the heavenly banquet at the end of time.
9. Trinitarian doxology
10. The Lord's Prayer usually follows the eucharistic prayer
11. Breaking the Bread: The 1979 BCP highlights the action by calling for silence after the breaking the bread and providing a fraction anthem that may be said or sung.
12. The Reception of Communion: The 1979 BCP provides several options for the words said at the administration of communion. The Additional Directions in the 1979 BCP call for the celebrant to receive first, followed by other clergy at the altar/table.
13. Sending (Going Out as God's People): A prayer after communion may include communal expression of thanksgiving for the gifts received and/or reference to the gathered community being sent into the world. A trinitarian blessing is common, though not necessary, and the final words of the liturgy are a dismissal, sending the assembly into the world.

3. **The Daily Office:** Of all the historic Christian rites, the texts of the Daily Office rites have been more explicitly scriptural than any other, as the majority of the language was directly taken from the Bible. In the 1979 BCP, the Daily Offices maintain the structure introduced in the first English Book of Common Prayer (1549). Fundamental features of Anglican Daily Offices include:

- a. The 1979 BCP calls the opening section "The Invitatory." This takes the form of a verse and response, followed by a trinitarian doxology. An invitatory Psalm (Venite or Jubilate) has been part of Anglican Morning Prayer since the sixteenth century. For Evening Prayer, the 1979 BCP

introduced the ancient Greek hymn “O gracious light.” An opening sentence of scripture and a general confession and absolution (or declaration of pardon) may precede the opening verse.

b. The recitation of a portion of the Psalter, as designated in a lectionary.

c. The reading of portions of Holy Scripture, also designated in a lectionary.

d. Response to the reading in praise, with texts usually taken directly from Scripture (i.e., canticles)

e. Prayer that since the sixteenth century has included the Lord’s Prayer, suffrages (a series of verses and responses), and collects. The 1979 BCP adds a prayer for mission and allows for authorized intercessions and thanksgivings to follow the collects.

f. The offices have also included the recitation of the Apostles’ Creed as well as hymns and anthems.

g. Since the seventeenth century, Anglican Offices have concluded with the Prayer of St. Chrysostom and the Grace (2 Cor. 13). The 1979 BCP allows for either the General Thanksgiving or the Prayer of St. Chrysostom or both, and adds the optional verse “Let us bless the Lord” before the Grace.

Seeking and Receiving Liturgical Material from Dioceses and Worshiping Communities

Early in the triennium, the Task Force communicated with every diocesan bishop, encouraging each bishop to create a diocesan liturgical commission and share with the Task Force the name of the chair or a contact person in the diocese. As the Task Force learned of diocesan liturgical commissions it posted that information on its website www.episcopalcommonprayer.org. In February 2020, the Task Force published guidelines for diocesan liturgical commissions.

Through the diocesan liturgical commissions and social media, the Task Force invited worshiping communities and individuals to submit new liturgical materials. Over the course of three meetings (in-person and online), Working Group I reviewed twenty-four (24) submissions of alternative liturgical texts or sets of texts. Using the *Principles to Guide the Development of Liturgical Texts* and the *Guidelines for Expansive and Inclusive Language* as developed by the Task Force, each submission or collection was evaluated to determine if it satisfactorily met all criteria of the Principles and Guidelines. Every submission was read by each member of Working Group I for review of language and theology. Most submissions were read aloud within Working Group I to hear their cadence and iteration.

Of the twenty-four submissions, six were found to meet the full requirements of the Principles and the Guidelines. These six are commended to the Standing Commission on Liturgy and Music for its continued review. The six examples of alternative liturgical texts are available on the website: www.episcopalcommonprayer.org.

On behalf of the Task Force, Working Group I has prepared a resolution that calls for liturgical revision to continue in two ways: first, through experimentation and creation of alternative texts in local worshipping communities, under the guidance of diocesan bishops and liturgical commissions, a process introduced in resolution 2018-A068; second, through the development of liturgical texts that the 81st General Convention (2024) may consider for authorization for use throughout The Episcopal Church. For the latter, the SCLM might draw from resources already submitted to the Task Force on Liturgical and Prayer Book Revision, and/or from new resources it receives from dioceses and local worshipping communities, and/or from new texts it develops.

The Principles for the Development of Liturgical Texts, above, were vetted, formally and informally, across the church and received a quite positive response. The Task Force believes that these principles provide solid guidance for future liturgical and BCP revision. Our work generated good material from across the church and we reviewed it all. The foundation has been created for the SCLM to pick up the work and decide the best way to move it forward.

Report of Working Group II: Communications and Website

Background & Creation of www.episcopalcommonprayer.org

The Task Force for Liturgical and Prayer Book Revision determined that online (mobile as well as desktop) platforms would be essential for gathering and distributing new or revised liturgical texts and resources. Since The Episcopal Church already has a significant online presence and infrastructure in place, we felt that it was necessary to survey the state of the digital landscape as it related to liturgical resources, to see whether we could use an existing platform or would be better served creating a new one for our particular needs.

We detailed the various liturgical resources that were available in early 2019 on a variety of official and unofficial websites. We discovered that though many liturgical texts were available online in a variety of official and unofficial websites and mobile apps, there was no single online place where someone might easily (and freely) find and browse which liturgies were currently authorized by The Episcopal Church. (Note: *RiteSeries* online is a pay/subscription platform that serves a narrow purpose, primarily bulletin building and music licensing.) None of the existing official or unofficial liturgical resource websites provided background information on how liturgical texts were

authorized. In many cases, authorized liturgical texts and resources were side-by-side with unauthorized texts and resources without distinction. Some of the available liturgical material was out of date. There were also inaccuracies and errors in terms of sources and whether something was official and/or authorized or not. For more detailed information, see *Addendum: Survey of Episcopal Liturgies available online (as of April 30, 2019)*, which may be found at www.episcopalcommonprayer.org.

We determined that there was no single, official, free, access point for browsing and comparing liturgies and liturgical resources authorized for use by The Episcopal Church. We did not originally intend to build a website that provided a library of authorized liturgical resources, but we felt that it was impossible to consider liturgical and Prayer Book revision without first having a clear understanding of which liturgies were already authorized for use in The Episcopal Church.

We created and built www.episcopalcommonprayer.org, which we hoped could serve as the single, official access point for all authorized liturgies and liturgical resources and include information on how each liturgy is authorized by General Convention.

In the short time that www.episcopalcommonprayer.org has been online, it has become evident that there is not broad understanding of which liturgies are already authorized for use in The Episcopal Church. The site has proven a valuable resource for Episcopalians and others who desire to see how we as a church craft and authorize our common liturgical resources. It is evident that there is a wealth of authorized liturgical material that is presently underutilized. Having everything in one place makes it far easier to see where and in what ways revision is necessary.

Content of www.EpiscopalCommonPrayer.org

The “Home” page of www.episcopalcommonprayer.org serves as the communications hub of the Task Force with links to and information about:

- Mandating Resolution 2018-A068
- Task Force Membership and Meeting Materials
- Documents drafted by the Task Force and made available for review by the wider church.

2018-A068 resolved: “That our liturgical revision take into consideration the use of emerging technologies which provide access to a broad range of liturgical resources.” Following that mandate www.episcopalcommonprayer.org includes:

- An “Existing Liturgies” page with a list of every known existing liturgical text or resource currently authorized for use by The Episcopal Church. This page includes a link to official digital and hard copies (when available) of every known existing liturgical text or resource authorized in The Episcopal Church. We intentionally did not link to secondary booksellers or unofficial websites: for example, the 1928 BCP, which is authorized for limited use, is not available from Church Publishing and no PDF has been published or made available by TEC.
- An “FAQ” page with relevant information about how each liturgy or resource is authorized is provided alongside the text or resource. A link to the full Act of General Convention from the Archives is also provided.
- A “Links” page linking to a wide variety of liturgical material available from various Episcopal Church resources – some official and some unofficial.

2018-A068 resolved: “That bishops engage worshipping communities in experimentation and the creation of alternative texts to offer to the wider church, and that each diocese be urged to create a liturgical commission to collect, reflect, teach and share these resources with the TFLPBR.”

Following that mandate www.episcopalcommonprayer.org includes:

- A “Submissions” page where any person or liturgical commission can submit liturgical material to the Task Force for review.
- A “Diocesan Liturgical Commissions” page listing which dioceses are known or not known to have created liturgical commissions.

Future use of www.EpiscopalCommonPrayer.org

2018-A068 resolved “That our methodology be one of a dynamic process for discerning common worship, engaging all the baptized, while practicing accountability to The Episcopal Church;” and the Task Force believes that www.episcopalcommonprayer.org can fulfill that mandate by serving as:

- The single, official access point for all authorized liturgies and liturgical resources with up to date and accurate information on how each liturgy is authorized by General Convention;
- As the hub for receiving and reviewing alternate liturgical material.

We recommend that Standing Commission on Liturgy and Music oversee and maintain the website, and we offer the following guide on how the website can continue and grow:

- The site is divided, clearly into two distinct sections:

- **AUTHORIZED LITURGIES:** The site should maintain an up to date list of existing liturgies (in English and other languages) and how they are authorized by The Episcopal Church.
 - This list should include links to digital versions of these liturgies as well as links to each Act of Convention authorizing the liturgy.
 - We envision a more dynamic version of these liturgies than simply linking to PDFs, and hope that in addition to providing the PDFs, all authorized liturgies could eventually be available in a more user-friendly HTML format.
- **LITURGICAL REVISION & EXPERIMENTATION:** The site provides a platform where new liturgical material can be submitted from and reviewed by the wider church
 - Authorized versions of Principles for New Liturgical Texts and Expansive & Inclusive Language Guidelines, and/or similar resources should be available and easily accessible to guide how liturgical texts might be crafted;
 - The Submissions Page should continue as a conduit for the wider church to pass on material to the SCLM for review and consideration;
 - Not yet authorized and alternate liturgies that the SCLM seeks to make available for review or for use in some way can be published on the site – it is essential that these liturgies be kept and marked as distinct from authorized liturgies
- The whole of the website, together with all liturgical materials and information, should be available in English, Spanish, French, and Haitian Kreole, following the principles of dynamic equivalence.
- The SCLM should consider forming a subcommittee to oversee, build, and maintain the website.
- Membership on the subcommittee should include:
 - The Chair of the SCLM or an authorized deputy who is a member of the SCLM;
 - The Custodian of the Standard Book of Common Prayer;
 - At least one other SCLM member;

- The Secretary of General Convention or an authorized deputy of the Secretary;
- An officer or deputy from Church Publishing
- At least two volunteers chosen from the many gifted coders and website designers in The Episcopal Church.

Cost of Maintaining www.EpiscopalCommonPrayer.org

There is broad misunderstanding that building and maintaining a website – even a complex one – is an expensive enterprise. This is not the case. Most of our congregations run their own websites with limited budgets, and there are numerous unofficial, yet excellent, liturgical resource websites run by Episcopalians/Anglicans (see the Links section of www.episcopalchurch.org). One skill set that we are not lacking is gifted coders who understand and love liturgy. There are nominal fees for hosting a website and domain name registration (under \$100 a year).

www.episcopalchurch.org was built and is currently maintained by a subcommittee of the Task Force who all have other full-time jobs and church responsibilities. A subcommittee with volunteers who understand basic coding and web maintenance can certainly continue to maintain it.

A resolution pertaining to the continuance of this website may be found in the resolutions section of this report.

Report of Working Group III: Constitution and Canons Review

Introduction

The charge to the Working Group on Constitution and Canons Review is found in the seventh Resolve of Resolution 2018-A068:

Resolved, That the TFLPBR in consultation with the Standing Commission on Structure, Governance, Constitution and Canons is directed to propose to the 80th General Convention revisions to the Constitution and Canons to enable The Episcopal Church to be adaptive in its engagement of future generations of Episcopalians, multiplying, connecting, and disseminating new liturgies for mission, attending to prayer book revision in other provinces of the Anglican Communion;

This Working Group (III) received guidance from these proposed principles developed by Working Group I: *Seek Receive, Review* and from the fuller discussions of the Task Force:

- That the 1979 Book of Common Prayer is the foundation and model for common prayer and liturgical development in The Episcopal Church.
- That the primary platform for our authorized liturgies be digital and online - organized according to the shape of the 1979 BCP - thus allowing for the authorization of more material than is possible within the limits of a printed book (with printed books remaining as an option).
- That we continue the requirement of approval by two consecutive General Conventions for authorized rites included in the Book of Common Prayer of The Episcopal Church, and that we encourage the further development of alternative rites for use.

Achieving these principles guided the Working Group's review of and the drafting of proposed changes to the Constitution and Canons as presented in the resolutions section of this report.

Moving the Church's perception of what the Book of Common Prayer looks like - from printed to published, from printed book form to online and digital platforms, from "first class" and "second class" liturgies, and from time-locked forms to evolving forms – took up much of the Working Group's discussion and consideration. It is often said that the Constitution and Canons follow change in the Church, rather than lead it. Hence, amending the Constitution and Canons is often a chase to catch up to the winds of change as they move across the Church. Without knowing where the work of Prayer Book revision will lead, the proposed resolutions to amend the Constitution and Canons rather build upon the work and direction of the Standing Commission on Liturgy and Music, its 2018 Blue Book Report, and Resolution 2018-A063, *amending Article X of the Constitution: to expand the Church's repertoire of authorized liturgical rites through trial use and supplemental liturgies*.

Constitution Article X

The 79th General Convention adopted Resolution 2018-A063 on first reading, amending Constitution Article X to authorize the use of alternative and additional liturgies to supplement the Book of Common Prayer, by following the procedure for adoption by any one meeting of the General Convention. The Task Force endorses this amendment and recommends that the 80th General Convention adopt it on second reading.

Working Group III on Constitution and Canons Review is proposing additional amendments to Constitution Article X, summarized as follows:

- Reorganizes the existing text for clarity and updates terminology;

- Adds a statement that expresses the Task Force’s understanding of the Book of Common Prayer;
- Makes clear that liturgies proposed to General Convention must come with a recommendation from the Standing Commission on Liturgy and Music; and
- Numbers the paragraphs for ease of reference and citation.

Canons Amendments

The second resolution proposes canonical changes to reflect and implement the proposed amendments to Constitution Article X. ***The Canon changes would not be acted upon until the 81st General Convention (2024) when passage of the amended Article X would be adopted on second reading, but are included here to inform General Convention’s consideration.***

The proposed canonical amendments may be summarized as follows:

- Changing language implying methods of publishing the Book of Common Prayer, such as changing “copy” to “text” or “edition” as context requires;
- Making clear that the same standards for publication apply to all liturgies, such as certification by the Custodian and the method for addressing typographical errors;
- Clarifying accountability for directives of the Canons, such as who is charged with carrying out the described action.

Working Group IV: Liturgical Revision and Creation

Working Group IV: Liturgical Revision and Creation was organized with two main tasks before it: (1) to identify aspects of our present corpus of liturgical materials that are in need of revision, modification, or fully authorized alternatives; and (2) to identify the ritual needs of communities within the church that have need for rites that to do presently exist, whether of a pastoral, missional, cultural sort.

To begin its work, the Working Group cast an interpretation of 2018-A068 that was adopted by the whole Task Force as a statement of agreed principles. (See above)

Members of *Working Group IV: Liturgical Revision and Creation* also worked with members of the Standing Commission on Liturgy and Music, and members-at-large of the Task Force, to create a proposed set of guidelines to steer the use inclusive and expansive language as liturgical revision and creation continues. These guidelines have been agreed upon by both the Task Force and the

Standing Commission on Liturgy and Music and are jointly commended to the 80th General Convention for adoption as the working document on liturgical language. These guidelines are consonant with the principles set forth in 2018-A068. The text is as follows:

Guidelines for Expansive and Inclusive Language

Introduction

Language is a gift of God. God is one who speaks. God calls all creation into being and gives people language as a way of responding to God and forming community.⁽⁸⁾

- In the context of God-given human freedom, languages develop as cultural products of humanity.
- Language, while a gift of God, is damaged, finite, and limited. Language has been used for good and for ill throughout the history of the church and the world.
- Development of liturgical language must enlist the skills of scholars, poets, linguists, musicians, and cultural specialists.

We seek to maximize rather than erase language from our liturgical lexicon.

- Language matters. It shapes our sense of reality, and through language we forge and maintain our relationships with God and one another.

Expansive Language: Expansive language seeks to tell as much truth about God as we can, utilizing the full range of language available to us. It does not displace traditional language for God, but uses additional metaphors. Of course, no human language can contain God. Even so, our theologies of creation, Incarnation, and Resurrection affirm that the material world, including language, is a means to understand God in a more faithful way.⁽⁹⁾

Inclusive Language: Our language often has built-in biases that exclude and harm some persons. When exclusive language is used, we fall short of our calling to respect all who are created in the image of God. By using inclusive language for humanity, we respect the dignity of every human being and we affirm our faith in “the communion of saints” as expressed in the Apostles’ Creed.⁽¹⁰⁾

Metaphorical Language: Words and images matter. They shape our perceptions; they can make the difference between forging trust or creating distance. Language changes and grows as the church grows in its understanding and embrace of diverse groups of people.

- The purpose of liturgy is to worship God.

- Worship in The Episcopal Church is not formulated in a vacuum.
- Ecumenical agreements and historical formulations, particularly for Baptism, Eucharist, and Ministry, are important norms in the work of liturgical revision and creation.⁽¹¹⁾
- Liturgical language about Jews should avoid supersessionism and avoid the assumption that the assembly comprises only Gentile Christians.
- The church worships in many languages. The principles outlined in this document are primarily for use in English. Dynamic translations of inclusive and expansive language will require their own application of these principles.

LANGUAGE ABOUT/FOR GOD

Expansive Language

The church continually draws from the vocabulary of the Scriptures, expanding the treasury of language and images in order to proclaim the fullness of the triune God.⁽¹²⁾

We aim to expand language for God (names, metaphors) that has not been included in our current liturgical language, maximizing/multiplying our liturgy's language for God.

This includes but is not limited to, drawing language/verbal pictures from Scripture and from the 2,000-year-old textual deposit of Christian liturgy and theology.

- As the church expands its liturgical language for God, it should attend to imagery that has resonated with different Christians communities, in different times, places, and cultural landscapes.
- The church recognizes that the Old Testament/Hebrew Scriptures constitutes a majority of our Scripture; i.e., we ought not always default to language drawn from the New Testament.
- We seek language for God that implicitly acknowledges that all of humanity is created in the image of God, being mindful in particular of the ways that gendered language for God can sometimes imply otherwise.

Liturgical revision/expansion recognizes that any single given prayer is part of a larger liturgical whole; no single prayer need bear the entire burden for expanding God-language.

It is especially important that principal liturgies (Holy Baptism and Holy Eucharist, Liturgies of the Word, the Psalter) engage expansive language.

- As we seek such language in principal liturgies, we attend to earlier liturgies that have offered expanded images, e.g. the font as the womb of the church.⁽¹³⁾

Liturgists ought not presume that there is only one pronoun for God.

We understand that in using language about God, multiple goods (ethical goods, moral goods, pastoral goods, theological goods, historical goods etc.) are in play, and sometimes these are in tension with each other. Those who craft prayers seek to attend to the assembly, the Bible, creedal statements, etc., and when, in the work of new liturgy, the demands of one of those is in tension with the demands of another, we acknowledge the tension and allow it to be generative.

LANGUAGE ABOUT/FOR HUMANITY

Inclusive Language

- Liturgical language for persons should reflect the diversity of all humankind.
- Liturgical language needs to recognize the history and lived experience of each community and the rich diversity that is present in those communities.
- All worshiping communities deserve to name themselves and have their names be honored. For example, a congregation may prefer to be called a church for the “deaf” rather than “hearing-impaired.”
- Prayers and liturgies should strive to avoid instances of cultural appropriation that are insensitive and even experienced as violent to the original culture. When communities do use prayers drawn from other cultures, such use should be sensitive to the original meaning and context.
- As much as possible, it is important to avoid binaries as standing for the whole of humanity. For example, “brothers and sisters” may exclude those who are gender non-binary.

LANGUAGE NOT REFERRING TO GOD OR HUMANITY

Metaphorical Language (e.g. light, hearing, seeing, standing etc.)

Those crafting liturgies ought to be attentive to ways liturgical language may have an implicit politics, may unintentionally arrange power, or may imply an anthropology in ways that contradict the Baptismal Covenant.

- e.g., Light vs Darkness, Sight vs Blindness

CONCLUSION

The transcendent God, who is at the heart of our liturgy and worship, “surpasses all human understanding.”⁽¹⁴⁾ Our language of worship therefore points to and evokes the mystery of God –God whom we cannot fully comprehend or completely imagine, and yet God who is revealed to us in words and images conveyed across “family, language, people, and nation.”⁽¹⁵⁾ The Church’s liturgical language is by its nature transcultural, contextual, countercultural, and cross-cultural.⁽¹⁶⁾ And the Church’s liturgical language is biblical, drawing on the stories and images of Scripture. Through expansive, inclusive and metaphorical language, the Church aims to participate in the mysterious abundance of God, and to speak to God in language that might delight the One who delightedly created diversity and abundance.

A FINAL WORD

The Task Force for Liturgical and Prayer Book Revision has completed the work assigned to it and offers our efforts to the 80th General Convention for consideration. We particularly commend the documents reviewed in our report that are recommended to the Convention to guide this work going forward: *Common Prayer: Worship in The Episcopal Church*; *Principles to Guide the Development of Liturgical Texts*; and *Guidelines for Expansive and Inclusive Language*.

We are grateful for the privilege of having served our church in this way and we look forward to encouraging the work of liturgical and prayer book revision to enrich our common prayer across the increasingly broad and diverse spectrum of the church.

End Notes

- (1) "Principles for Evaluating Liturgical Materials," *I Will Bless You and Your will be a Blessing*, Liturgical Resources 1, revised and expanded (New York: Church Publishing, 2015) 229.
- (2) International Anglican Liturgical Consultations: A Review: <https://www.anglicancommunion.org/media/120963/IALC-Review.pdf> . For more about the International Anglican Liturgical Consultation, see <https://anglicancommunion.org/theology/liturgy.aspx>
- (3) *An Outline of the Faith*, BCP 1979, 853-54.
- (4) BCP 1979, 877.
- (5) Lutheran World Federation, Nairobi Statement, <https://worship.calvin.edu/resources/resource-library/nairobi-statement-on-worship-and-culture-full-text> quotations in this section are from the Nairobi Statement. For an Anglican perspective, see International Anglican Liturgical Consultations: A Review, 4-8.
- (6) International Anglican Liturgical Consultations: A Review, 8-9.
- (7) "The Structure of the Eucharist," in *Our Thanks and Praise: The Eucharist in Anglicanism Today*, ed. David R. Holeton (Toronto, Ontario: Anglican Book Centre, 1998) 284.
- (8) Borrowed/adapted from the ELCA "Principles for Worship": https://download.elca.org/ELCA%20Resource%20Repository/Principles_for_Worship.pdf
- (9) Borrowed/adapted from the University of the South School of Theology, "Language Matters" (Advent 2018).
- (10) Borrowed/adapted from the University of the South School of Theology, "Language Matters" (Advent 2018).
- (11) World Council of Churches Faith and Order Paper 111 (1982). https://www.anglicancommunion.org/media/102580/lima_document.pdf
- (12) Borrowed/adapted from the ELCA "Principles for Worship": https://download.elca.org/ELCA%20Resource%20Repository/Principles_for_Worship.pdf
- (13) See, e.g., Robin M. Jensen, "Mater Ecclesia and Fons Aeterna: The Church and Her Womb in Ancient Christian Tradition." in Amy-Jill Levine and Maria Mayo Robbins, eds., *A Feminist Companion to Patristic Literature* (New York: T & T Clark, 2008), 137-53.
- (14) Philippians 4:7
- (15) Revelation 7:9; Book of Common Prayer 1979 Page 94 Canticle 18
- (16) "Nairobi Statement on Worship and Culture," in S. Anita Stauffer, ed., *Christian Worship: Unity in Cultural Diversity* (Geneva: Lutheran World Federation, 1996), 23-28.

Proposed resolutions

A057 Continuing Liturgical and Prayer Book Revision

Resolved, the House of ____ concurring, that the 80th General Convention direct the Standing Commission on Liturgy and Music to continue the work of liturgical and Prayer Book revision; and be it further

Resolved, That the 80th General Convention direct the SCLM to use in its work on liturgical and Prayer Book revision *The Principles to Guide the Development of Liturgical Texts* included in the report to the 80th General Convention (known as their "Blue Book" report) of the Task Force on Liturgical and Prayer Book Revision; and be it further

Resolved, That bishops continue to engage worshipping communities in experimentation and the creation of alternative texts to offer to the wider church, and diocesan liturgical commissions collect and share these resources with the SCLM; and be it further

Resolved, That the 80th General Convention direct the SCLM to review materials submitted to the Task Force on Liturgical and Prayer Book Revision and the recommendations of that Task Force regarding those materials; and be it further

Resolved, That the 80th General Convention direct the SCLM to present to the 81st General Convention liturgical texts for optional and/or trial use in the ongoing process of liturgical and Prayer Book revision.

EXPLANATION

In Resolution 2018-A068, the 79th General Convention created a Task Force on Liturgical and Prayer Book Revision, called for bishops to engage worshipping communities in experimentation and the creation of alternative texts to offer to the wider church, and urged each diocese to create a liturgical commission to collect these resources and share them with the Task Force. To guide this work, the Task Force developed a set of liturgical principles rooted in Anglican tradition as received and interpreted in the 1979 Book of Common Prayer. During the triennium, the Task Force received a number of liturgical texts, which it evaluated in light of the liturgical principles.

This resolution returns responsibility for liturgical and Prayer Book revision to the Standing Commission on Liturgy and Music (SCLM). It directs the Commission to use the principles in the ongoing work of revision. The Task Force has made recommendations about the liturgical resources

it received during the triennium, and this resolution directs the SCLM to review those recommendations.

This resolution also calls for liturgical revision to continue in two ways: first, through experimentation and creation of alternative texts in local worshiping communities, under the guidance of diocesan bishops and liturgical commissions, a process introduced in Resolution 2018-A068; second through development of liturgical texts that the 81st General Convention can consider for authorization for use throughout The Episcopal Church. For the latter, the SCLM might draw from resources already submitted to the Task Force on Liturgical and Prayer Book Revision, and/or from new resources it receives from dioceses and local worshiping communities, and/or from new texts it develops.

A058 Resolution on Official Liturgical Website for The Episcopal Church

Resolved, the House of ____ concurring, that the 80th General Convention establish www.episcopalcommonprayer.org, which is already owned by the DFMS, as the official liturgical website of The Episcopal Church; and be it further

Resolved, that www.episcopalcommonprayer.org continue to include a complete list of and links to official digital copies and hard copies of all liturgies authorized for use in The Episcopal Church; and be it further

Resolved, that www.episcopalcommonprayer.org continue to include a summary of and link to the relevant Act of Convention authorizing each liturgy; and be it further

Resolved, that www.episcopalcommonprayer.org continue to include a distinct area for submitting new/alternate liturgical material from the wider church; and be it further

Resolved, that www.episcopalcommonprayer.org continue to include a distinct area for reviewing new/alternate liturgical material; and be it further

Resolved, that www.episcopalcommonprayer.org include other relevant liturgical resources and materials as determined by the Standing Commission on Liturgy and Music; and be it further

Resolved, that the Standing Commission on Liturgy and Music oversee and maintain www.episcopalcommonprayer.org; and be it further

Resolved, that the Standing Commission on Liturgy and Music form a subcommittee to maintain operation of www.episcopalcommonprayer.org whose membership shall include: The Chair of the SCLM or an authorized deputy who is a member of the SCLM; The Custodian of the Standard Book of Common Prayer; at least one other SCLM member; The Secretary of General Convention or an authorized deputy of the Secretary; A representative from Church Publishing; At least two volunteers chosen by the chair of the SCLM from among the many gifted coders and website designers in The Episcopal Church; and be it further

Resolved, that the 80th General Convention amend Canon I.1.2.n.2 to add a new subsection:

x. Oversee and maintain the official liturgical website of The Episcopal Church through a subcommittee whose members shall include the Chair of the SCLM or an authorized deputy who is a member of the SCLM; the Custodian of the Standard Book of Common Prayer; at least one other SCLM member; the Secretary of General Convention or an authorized deputy of the Secretary; a representative from the publisher affiliated with the Church Pension Fund; at least two members with skill in website design and coding, to be appointed by the Chair of the SCLM.

EXPLANATION

The Task Force for Liturgical and Prayer Book Revision determined that online (mobile as well as desktop) platforms would be essential for gathering and distributing new or revised liturgical texts and resources. Since The Episcopal Church already has a significant online presence and infrastructure in place, we felt that it was necessary to survey the state of the digital landscape as it related to liturgical resources to see whether we could use an existing platform or would be better served creating a new one for our particular needs.

We detailed the various liturgical resources that were available in early 2019 on a variety of official and unofficial websites. We discovered that though many liturgical texts were available online in a variety of official and unofficial websites and mobile apps, there was no single online place where someone might easily (and freely) find and browse which liturgies were currently authorized by The Episcopal Church. (Note: *RiteSeries* online is a pay/subscription platform that serves a narrow purpose, primarily bulletin building and music licensing.) None of the existing official or unofficial liturgical resource websites provided background information on how liturgical texts were authorized. In many cases authorized liturgical texts and resources were side-by-side with unauthorized texts and resources without distinction. Some of the available liturgical material was out of date. There were also inaccuracies and errors in terms of sources and whether something was official and/or authorized or not. For more detailed information, see Addendum: Survey of Episcopal

Liturgies available online (as of April 30, 2019), which may be found at www.episcopalcommonprayer.org.

We determined that there was no single, official, free, access point for browsing and comparing liturgies and liturgical resources authorized for use by The Episcopal Church. We did not originally intend to build a website that provided a library of authorized liturgical resources, but we felt that it was impossible to consider liturgical and Prayer Book revision without first having a clear understanding of which liturgies were already authorized for use in The Episcopal Church.

We created and built www.episcopalcommonprayer.org, which we hoped could serve as the single, official access point for all authorized liturgies and liturgical resources and include information on how each liturgy is authorized by General Convention.

A059 Amend Article X of the Constitution of The Episcopal Church (First Reading)

Resolved, the House of ____ concurring, that the 80th General Convention of The Episcopal Church amend Article X of the Constitution of The Episcopal Church as follows:

Sec. 1. ~~The Book of Common Prayer, as now established or hereafter amended by the authority of this Church the General Convention, shall be in use in all the Dioceses of this Church. The Book of Common Prayer is understood to be those liturgical forms authorized by the General Convention as provided for in Section 2 of this Article. No alteration thereof or addition thereto shall be made unless the same shall be first proposed in one regular meeting of the General Convention and by a resolve thereof be sent within six months to the Secretary of the Convention of every Diocese, to be made known to the Diocesan Convention at its next meeting, and be adopted by the General Convention at its next succeeding regular meeting by a majority of all Bishops, excluding retired Bishops not present, of the whole number of Bishops entitled to vote in the House of Bishops, and by a vote by orders in the House of Deputies in accordance with Article I, Sec. 5, except that concurrence by the orders shall require the affirmative vote in each order by a majority of the Dioceses entitled to representation in the House of Deputies.~~

Sec. 2. ~~No alteration of or amendment or addition to the Book of Common Prayer shall be made unless the General Convention approve the same on first reading in one regular meeting of the General Convention and, by resolve so directing, be sent by the Secretary of the General Convention to the Secretary of the Convention of every Diocese, to be made known to the Diocesan Convention at its next regular meeting, and be adopted on second reading without alteration by the General Convention at its~~

next succeeding regular meeting by a majority of all Bishops, excluding retired Bishops not present, of the whole number of Bishops entitled to vote in the House of Bishops, and by an affirmative vote by orders in the House of Deputies in accordance with Art. I, Sec. 5 of this Constitution, except that concurrence in the affirmative by the orders shall require the affirmative vote in each order by a majority of the Dioceses entitled to representation in the House of Deputies.

Sec. 3. ~~But notwithstanding anything herein above contained,~~ The General Convention may, at any one meeting, by a majority of the whole number of the Bishops entitled to vote in the House of Bishops, and by a majority of the Clerical and Lay Deputies of all the Dioceses entitled to representation in the House of Deputies, voting by orders as previously set forth in this Article:

(a) Amend the Table of Lessons and all Tables and Rubrics relating to the Psalms.

(b) Authorize for trial use throughout this Church, as an alternative at any time or times to such revisions of or alternatives to the *established* Book of Common Prayer, in whole or in part, as may be proposed from time to time by the Standing Commission on Liturgy and Music, and implemented according to the directives of the General Convention. ~~or to any section or Office thereof a proposed revision of the whole Book or of any portion thereof, duly undertaken by the General Convention.~~

(c) Authorize for use throughout this Church, as provided by Canon, alternative and additional liturgies to supplement those provided in the Book of Common Prayer.

Sec. 4. ~~And provided that~~ Nothing in this Article shall be construed as restricting the authority of the Bishops of this Church to take such order as may be permitted by the Rubrics of the Book of Common Prayer or by the Canons of the General Convention for the use of special forms of worship *within their jurisdiction*.

EXPLANATION

General Convention Resolution 2018-A068 directed the Task Force on Liturgical and Prayer Book Revision to propose to the 80th General Convention revisions to the Constitution and Canons “to enable The Episcopal Church to be adaptive in its engagement of future generations of Episcopalians, multiplying, connecting, and disseminating new liturgies for mission, attending to prayer book revision in other provinces of the Anglican Communion.”

The proposed draft revision of Article X reorganizes the text for clarity of language and structure; incorporates the text of Resolution 2018-A063, passed on first reading and pending for second reading; and responds to the expressed yearning for inclusive language and expansive imagery for

humanity and divinity through approved trial and supplemental liturgies to the Book of Common Prayer and sanctioned for optional use throughout the Church.

The opening statement of Article X is not changed, retaining the principle that the BCP is the standard and normative liturgical text for worship in this Church. A second sentence is added to express the understanding that all liturgies that General Convention authorizes following the protocol of Section 2 are part of the Book of Common Prayer. The remainder of the section, setting forth the method of adoption, becomes Section 2. The amendments attempt to shift the Church's awareness that contemporary and future methods of publication may not be restricted to the form of a book. What General Convention adopts as a prayer book is not a form of publication (a book) but rather the content, i.e., the text of the liturgies.

A060 Endorse Guidelines for Expansive and Inclusive Language

Resolved, the House of ____ concurring, that the 80th General Convention adopt *The Guidelines for Expansive and Inclusive Language*, contained in the reports to the 80th General Convention of the Task Force on Liturgical and Prayer Book Revision and the Standing Commission on Liturgy and Music, as the working principles for the revision and development of liturgical materials of The Episcopal Church; and be it further

Resolved, that the 80th General Convention direct the Standing Commission on Liturgy and Music to follow these guidelines as they develop revised and new liturgical materials; and be it further

Resolved, that when liturgical materials in languages other than English are developed for use in The Episcopal Church that they follow, to the greatest degree possible, the spirit and intent of these guidelines; and be it further

Resolved, that the 80th General Convention commend these guidelines to all persons who write or speak on behalf of the church for their serious reflection and consideration.

EXPLANATION

The 79th General Convention and previous Conventions, and the Standing Commission on Liturgy and Music, have repeatedly urged the church toward a richer language for God and more inclusive language for humanity, both in our liturgical prayer and in our daily discourse as God's people.

Resolution 2018-A068 explicitly set a clear direction in this regard and *The Guidelines for Expansive and Inclusive Language* were developed jointly by the Task Force on Liturgical and Prayer Book Revision and the Standing Commission on Liturgy and Music, to provide guidance on this matter going forward.

The Episcopal Church

Reports to the

80th General Convention

Otherwise known as

The Blue Book

Volume 3



Reports of the Committees, Commissions, Agencies, and Boards to
The General Convention of The Episcopal Church
Baltimore, in the State and Diocese of Maryland
July 7th – 14th, 2022

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Office of the General Convention

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Task Force to Develop Model Sexual Harassment Policies & Safe Church Training

Task Force to Respond to Opioid Epidemic

Task Force to Study Sexism in TEC & Develop Anti-Sexism Training

TASK FORCE ON CARE OF CREATION & ENVIRONMENTAL RACISM

Membership

The Rev. Stephanie Johnson, <i>Chair</i>	Connecticut, I	2021
The Rt. Rev. David Rice, <i>Vice-Chair</i>	San Joaquin, VIII	2021
Mr. Tyler Kerr, <i>Secretary</i>	Kansas, VII	2021
The Rev. Richard Acosta	Colombia, IX	2021
The Rt. Rev. Cathleen C. Bascom	Kansas, VII	2021
Ms. Bernadette Demientieff	Alaska, VIII	2021
The Rev. Nathan Empsall	Spokane, VIII	2021
The Rt. Rev. Robert Fitzpatrick	Hawaii, VIII	2021
The Rev. P. Joshua Griffin	California, VIII	2021
Dr. Delia Heck	Southwestern Virginia, III	2021
The Rt. Rev. A. Robert Hirschfeld	New Hampshire, I	2021
Ms. Perry Hodgkins Jones	Western North Carolina, IV	2021
The Rt. Rev. Mark Lattime	Alaska, VIII	2021
The Rev. Lester Mackenzie	Los Angeles, VIII	2021
The Rev. Hershey Mallette Stephens	North Carolina, IV	2021
The Rev. Weston Mathews	Virginia, III	2021
The Rev. Canon Dimas Munoz	Puerto Rico, IX	2021
Ms. Sarah Nolan	Virginia, III	2021
The Rev. Simeon Lewis Powell, <i>CG</i>	Northern California, VIII	2021
The Very Rev. Dr. W. Mark Richardson	California, VIII	2021
Mr. Brian Sellers-Petersen	Olympia, VIII	2021
Dr. Andrew Thompson	East Tennessee, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

Resolutions 2018-A011 & 2018-A013

2018-A011 Oppose Environmental Racism

Resolved, the House of Deputies concurring, That the 79th General Convention affirm the need for governments, private industry and all people to act to protect the health of all persons from unsafe and unhealthy exposures to air and water pollution, toxic substances, or radiation in their food, water supply, living quarters, and work places; and be it further

Resolved, That the Church recommit to the excellent work done by previous General Conventions of The Episcopal Church, specifically resolutions 2000-D005, 2012-B023, 2012-C079, and 2015-C013 and that General Convention affirm that no community, especially poor communities, those who live closest to the land in subsistence cultures, and members of marginalized ethnic groups, should bear a disproportionate risk of environmental pollution or degradation; and advocate for and support policies that protect these populations and the sanctity of communities and the livelihood of future generations from the disparate impact of climate change and environmental degradation; and be it further

Resolved, that General Convention direct the formation of a Task Force, not to exceed twelve people, including attorneys, health professionals, environmental professionals, and bishops and other clergy to study and report specific recommendations for appropriate changes in federal, state, or local law so that effective judicial remedies, based on a showing of disproportionate health or environmental impact on those living closest to the land in subsistence cultures, ethnic minorities or poor communities, can be obtained to address unwise governmental decisions with respect to land use, industrial, energy and transportation development, and application of environmental standards; and be it further

Resolved, The Task Force will report to Executive Council by the end of 2019.

2018-A013 Facilitating the Development of the Church's Ministry of the Care of Creation

Resolved, the House of Deputies concurring, That the 79th General Convention affirm the President of the House Deputies' and the Presiding Bishop's call to the Church to recognize Care of Creation as an integral part of The Jesus Movement; and be it further

Resolved, That, as disciples of Jesus Christ, we recognize that the Earth is the Lord's (Psalm 24), has been made in and through Christ (John 1) and we are placed in it as a garden planet (Genesis 2); and be it further

Resolved, That the General Convention urge the establishment of an additional senior staff position for the Care of Creation as a member of the Episcopal Church Center staff; and be it further

Resolved, That this staff person shall serve as a resource for the Church, a liaison between Episcopal faith communities and institutions with their many creation care initiatives, network developer for sharing best practices, contact person for the denomination, partners and faith communities, ambassador between evangelism, racial justice and care of creation, and advocate for funding, visibility and action; and be it further

Resolved, That the 79th General Convention authorize a Task Force for the Care of Creation to develop this aspect of the ongoing mission and ministry of The Episcopal Church; and be it further

Resolved, That this Task Force of up to 20 persons be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with members to include a geographically diverse representation from the Church mindful to include younger generations, people of color and native persons who are and will be disproportionately affected by climate change; and be it further

Resolved, That this Task Force work during the period of 2018-2021 and submit a report to the 80th General Convention; and be it further

Resolved, That the Task Force shall develop and refine the small grants program begun by the 2015-2018 Advisory Council for Stewardship of Creation to support local and regional eco-ministry efforts; engage eco-justice site projects, and further develop creation care networks based on bioregions (a region defined by characteristics of the natural environment rather than by human-made divisions) and/or areas of affinity, (e.g. renewable energy, regenerative agriculture, liturgy, Christian formation); and be it further

Resolved, That the staff person for the Care of Creation shall liaise with and support the work of the Task Force for the Care of Creation; and be it further

Resolved, That the Task Force shall receive and help disseminate case studies and best practices in keeping with the spirit of the Paris Climate Accord, that is, supporting humanity's transition from industrial life to sustainable life; and be it further

Resolved, That the General Convention recommend to the President of the House Deputies and the Presiding Bishop in consultation with the Task Force to establish and to appoint persons to a Theology of Creation Working Group tasked with facilitating innovative educational offerings in environmental ethics and theology for the formation of clergy and laity.

Summary of Work

The TFCCER was tasked to respond to two resolutions noted above. The Task Force which was convened folded in the Task Force on Environmental Racism and the Theology of Creation Working group.

The TF had their initial meeting in November 2018 in Maryland. At this meeting we shared our personal stories of faith, hope and care for creation, while outlining steps for our future work. While in those meetings, devastating fires raged in California near a church where one of our members served. In ways that would shadow future meetings and our work, we were deeply personally aware about the ravages of climate change. The second and final in person meeting was in Salt Lake City in November 2019. We spent time in prayer and reflection, sharing our stories and dreaming of new possibilities for the church and God's creation. We were very intentional at that meeting to spend time focusing on the pastoral and practical needs for a just transition away from fossil fuel, recognizing the need to be responsive and caring to the entire church. We had hoped to make that work one of our priorities in our final year along with our ecojustice efforts. However, the pandemic, upended much of that planning and visioning.

Throughout the triennium the entire TF met via zoom for 14 meetings. Our efforts were on forming individual working groups on three areas: environmental racism and ecojustice, networking and grants, and theology. We initially spent much time on our work around eco-justice and environmental racism, including fruitful conversation about the Episcopal Church's website and the glossary. In parallel, work began on revising the grants program with opportunities for large Impact grants. The carbon offset program, also detailed below, was an important area of focus which we had been excited to launch until the pandemic hit.

These groups met independently of the TF to advance their projects. Reports from each of these working groups are given below.

We were also tasked with evaluating and helping to develop unfunded resolutions from the 79th General Convention, using a budget line for these projects. Those projects included the following:

- Resolution 2018-C008, supporting the use of a web-based carbon tracker designed by the Diocese of California. The task force agreed to commit \$30,000 to this project.
- Resolution 2018-A018, supporting the Episcopal Church's participation in the United Nations Conference of Parties. The task force agreed to support that participation at a reduced level from previous years and to encourage a public application process for selecting participants.
- Resolution 2018-A014, creating a carbon offset program for the Episcopal Church. This resolution is addressed below.

- Resolution 2018-D053, creating a survey of church-owned lands and making recommendations for creation care of the lands. Plainsong Farms was funded to begin many aspects of this project and began mapping church-owned lands in three dioceses, plus is developing a toolbox for other dioceses to use. The Task Force recommended that Executive Council approve \$20,600 for this work which moved forward. The Task Force believes that moving forward this work can be aligned with the Asset Mapping for eco-justice.
- Resolution 2018-A213, a survey of energy and water efficiency in church buildings. The task force was unable to advance this project.
- Resolution 2018-D081, helping communities affected by change in energy use. The task force explored ways to advance this work with a variety of approaches; however, the planning work was slowed by the pandemic, but was unable to develop specific projects.

Environmental Racism/Environmental Justice Working Group

General Convention Resolution 2018-A011 called for the formation of a task force to address environmental injustice (the unequal distribution of environmental harms) and environmental racism (the systemic disproportionate imposition of environmental harms on communities of color specifically). This task force was subsequently combined with the task force addressing creation care to form the Task Force for Care of Creation and Environmental Racism (TFCCER), which then formed a working group specifically focused on environmental racism and environmental injustice.

The work of the Working Group on Environmental Racism and Environmental Justice focused on strengthening existing projects and networks through story-sharing and asset mapping. The group partnered with the Episcopal Asset Map to enhance the capabilities of the map in order to highlight areas of environmental injustice and racism and to facilitate partnerships with environmental justice organizations. In order to support environmental justice work on parish and diocesan levels, the working group developed a Care of Creation Glossary with an emphasis on various forms of environmental injustice and environmental racism. It also collaborated with the Office of the Presiding Bishop to develop a Creation Care Covenant with specific suggestions for “Loving Formation,” “Liberating Advocacy,” and “Life-Giving Conservation” and with a central role for the Asset Map. The group also helped reformat the Episcopal Church’s Creation Care website.

In its networking efforts, the Working Group on Environmental Racism and Environmental Justice formed partnerships with Repairers of the Breach, the National Black Environmental Justice Network, the Southeast Climate & Energy Network, Southeast Faith Leaders Network, Tennessee State University, St. Augustine University and Ferrum College to provide training on using the

Episcopal Asset Map for community engagement surrounding environmental concerns. In the context of this work, a proposal was drafted to develop and implement trainings for utilizing the asset map for environmental justice work and a toolkit for dioceses to establish their own environmental justice ministries. In December 2020, a pilot training was offered to five dioceses to test the use of mapping and discuss community organizing opportunities. It was agreed that these dioceses would continue to work on the asset maps with specific mapping layers that would provide important information for their eco-justice work. The staff at the Episcopal Church will be responsible for moving these efforts forward.

Theology Working Group

Resolution 2018-A008 tasked the TFCCER with forming a Theology of Creation Working Group to facilitate education in creation theology. With mandate this in mind, the working group collaborated with the editors of The Anglican Theological Review to compile a special thematic issue of the ATR entitled “All Things Hold Together: Intersections in Creation Care.” The issue is guest co-edited by Andrew Thompson and Sarah Nolan and includes a preface by Presiding Bishop Curry and articles in two languages and from a variety of diverse perspectives.

The articles in the issue include a study of social and environmental justice themes in the Bible by Colombian theologian Richard Acosta (published in English and Spanish); a political-economic examination of food security in the Biblical story of Joseph from Baptist minister and public health graduate student Darriel Harris; a critique of settler colonialism in society and in the church from First Nations priest and activist Rachel Taber Hamilton; the story of the radical Charis Community from cofounder Grace Aheron; a reflection on ecological grief and healing rituals in the diocese of New Hampshire from Bishop Rob Hirschfeld and Stephen Blackmer; insights from years of preaching on climate change from Margaret Bullitt-Jonas; and book reviews by Shadreck Kwagwanji, Allen Doyle, Perry Hodgkins Jones, and Andrew Sloane. The issue is scheduled for release in Spring 2021.

Networking and Grants Working Group

As part of its mandate under General Convention Resolution A013, the Task Force on Care of Creation and Environmental Racism was tasked with administering a small-grants program to facilitate care of creation ministries and eco-justice projects on local and regional levels and to develop a network of such ministries. As of this writing, one granting cycle has been completed, and a second is underway.

The first cycle was launched in the fall of 2019, and grants were awarded in early 2020. During this cycle, grants were solicited in two categories: Seed Grants (awards up to \$5000) and Impact Grants (awards up to \$20,000). Over 54 grant proposals were received representing over \$680,000 in funds requested. After an extensive review process 18 Seed Grants were funded, for a total of \$86,824.00, and 8 Impact Grants were funded, for a total of \$93,000.00 The overall total granted in the first

round was \$179,824.00. Projects ranged from small church based efforts to engage the local community in gardening and food justice projects, to larger projects re-envisioning use of land for green burials and native plant restoration.

The second cycle was launched in February 2021. For this second cycle, the Task Force is soliciting proposals for Impact Grant ranging from \$15,000 to \$40,000, with the expectation of funding ten or fewer projects from an available total of \$170,000. Grants will be awarded to long-term, collaborative projects that respond to issues of environmental racism and ecojustice by engaging in advocacy, civic engagement and developing climate resiliency. In this cycle, the Task Force will provide resources for faith-based community organizing and theological reflection and response concerning the sin of environmental racism, and for reconciliation informed by the concept of environmental reparations. Priority will be given to efforts which are supported and led by youth and young adults, communities of color and indigenous peoples. Grants will be awarded in April of 2021.

This small grants project is a means not only of supporting innovative creation care ministries, but also of the essential task of building a broad network of individuals, congregations, communities, and dioceses involved in such ministries. After multiple grant cycles in this triennium and the previous one, the Task Force has been able to compile a list of ministries that will form the foundation for an initial stage of formal network building, to be maintained in part by a monthly creation care newsletter.

Offset Project

General Convention Resolution 2018-A014 called for the development of a proposal for a Carbon offset program for The Episcopal Church, with provision for a future program for the dioceses and parishes of the broader church.

Carbon offsetting is a process whereby individuals and organizations can, in a sense, reduce their net carbon impact. In the context of the current crisis, it is absolutely essential that everything possible be done to actually reduce greenhouse gas emissions by such measures as reducing air travel and using renewable sources of energy. In our participation in God's mission, however, not all emissions are avoidable, and air travel in particular represents a large source of greenhouse gas emissions in the work of the church. In this situation, offsetting can be a way to balance such unavoidable emissions by purchasing a matching quantity of "negative emissions"; that is, by financially supporting projects that remove carbon dioxide and other greenhouse gasses from the atmosphere (such as tree-planting, or "carbon forestry") or reduce emissions in other areas (such as providing more efficient cookstoves). In order to be effective, offset programs require significant monitoring and accountability to ensure that the net total of emissions is actually being reduced. For example, program supervisors would need to verify that the negative emissions being purchased are actually occurring and would not be occurring without the purchase of offsets (this characteristic is referred to as "additionality"), and that they are permanent.

The Task Force for the Care of Creation and Environmental Racism (TFCCER) developed a proposal for the use of carbon offsetting for the church's unavoidable greenhouse gas emissions, particularly those from air travel. This proposal involved a multifaceted approach combining combining four potential sources of offsets: (1) Episcopal Relief and Development's carbon forestry and rice cultivation projects in the Philippines; (2) The University of the South's (Sewanee's) carbon forestry and coffee farming project in Haiti; (3) a domestic carbon forestry initiative to be developed; (4) third-party offset agencies, such as CoolEffect. By drawing on existing Episcopal Church programs and relationships, these options maximize opportunities for true accountability, education, and communion.

In order to establish an effective carbon offset program in fulfillment of 2018-A014, TFCCER recommended the allocation of \$25,000. Of this amount, \$15,000 was to be budgeted to cover wages and benefits for a part-time Offset Specialist. This individual would work to design and implement a comprehensive offset program, based on extensive research already done, combining the four options described above. In order to implement this program, the Offset Specialist would also need to track offset payments from DFMS personnel and offices, monitor offset projects, and provide reports to the Task Force. Finally, the Offset Specialist, in collaboration with the Task Force, would design and implement a communication strategy to educate church personnel on the importance of carbon offsetting as a theological practice. The remainder of the funding, \$10,000, would have been budgeted for implementing the anticipated communication strategy through virtual and printed information and expenses for meetings and speaking opportunities.

In addition to the budgeted amount of \$25,000 for program implementation, a program to offset travel emissions would require TEC to set aside funds to offset approximately 3500 tons of carbon dioxide equivalent (CO₂e) per year. While offset prices vary significantly, a rate of \$20/ton CO₂e is recommended for a combination of the four sources mentioned above.

Unfortunately, the Coronavirus pandemic and resulting financial limitations in early 2020 prevented the implementation of this proposal.

Proposed resolutions

Ao86 Continuing the Task Force for Care of Creation and Environmental Racism

Resolved, the House of _____ concurring, That the General Convention affirm the Presiding Bishop's and the President of the House of Deputies' continued call to the Church to recognize Care of Creation and Environmental Justice as integral and ongoing parts of the Church's loving, liberating, and life-giving work; and be it further

Resolved, That the General Convention commend the good work done by the Task Force for Care of Creation and Environmental Racism in the triennium following the 2018 General Convention; and be it further

Resolved, That the General Convention authorize a Task Force for Care of Creation and Environmental Racism to continue this work on behalf of the Episcopal Church in the next triennium; and be it further

Resolved, That this Task Force of up to 20 persons be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with members to include a geographically diverse representation from the Church mindful to include younger generations, persons of color and Native persons who are and will be disproportionately affected by climate change; and be it further

Resolved, That this Task Force submit a report to the 81st General Convention; and be it further

Resolved, That the General Convention direct this Task Force to make as a priority the development and support of programs that respond to eco-justice concerns, address systemic environmental racism, and work to alleviate environmental burdens on indigenous communities. Ensure that programs can be modeled across the provinces of the Episcopal Church; and to provide training and financial and other resources to facilitate these projects; and be it further

Resolved, that the General Convention directs the Task Force to further expand, support and promote the Creation Care Covenant recognizing that this work seeks to align with the loving, liberating and life giving work of evangelism and beloved community.

Resolved, that the General Convention direct the Task Force to continue its work on developing theological resources and materials on a range of environmental topics including but not limited to the sin of environmental racism, an exploration of environmental reparations and the ethical and moral implications of responding to climate change: and be it further

Resolved, That the General Convention direct this Task Force to continue the work of the previous Advisory Council (GC 2015) and Task Force (GC 2018) to implement the carbon offset program, support the efforts for just transition, increase and utilize the capabilities of the Episcopal Asset Map to support and respond to environmental injustices and to establish the network of asset-

based programs; to continue to work within the partnerships established in the previous triennium with environmental justice organizations nationwide; and to continue the grants program in order to accomplish the above objectives; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$850,000 during the triennium for the work outlined above.

A087 Net Carbon Neutrality by 2030

Resolved, the House of _____ concurring, That the Episcopal Church commit to a goal of net carbon neutrality in its operations and the work of staff, standing commissions, interim bodies, and General Convention by 2030, through a combination of reducing emissions from travel, reducing energy use, increasing energy efficiency in buildings, and purchasing offsets from duly investigated, responsible, and ethical partners; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to take concrete actions to reduce fossil fuel emissions from travel by said groups, such as through online meetings or regional gatherings; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to draft a policy to offset one hundred percent of fossil fuel emissions from unavoidable travel by said groups, either through an internal offset program or through purchase from duly investigated, responsible, and ethical partners, with appropriate accountability and oversight; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$70,000 per year for the implementation of this resolution, taken from existing travel budgets, in order to offset approximately 3500 tons of carbon dioxide equivalent (the average annual travel emissions of said groups from previous years) at a rate of \$20 per ton; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to establish an internal offset program including such activities as carbon forestry and regenerative agriculture, with appropriate oversight to ensure that the program meet the five commonly accepted traits of responsible offset programs: real, permanent, verifiable, additional, and enforceable; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$25,000 to establish this internal offset program, comprising \$15,000 to cover wages and benefits for a part-time Offset Specialist and \$10,000 for implementation and promotion of the program; and be it further

Resolved, that the General Convention encourage parishes, dioceses, schools, camps, and other Episcopal institutions to pursue their own goal of net carbon neutrality by 2030 through a combination of reducing emissions from travel, reducing energy use, increasing energy efficiency in buildings, and purchasing offsets from duly investigated, responsible, and ethical partners; and be it further

Resolved, that the General Convention direct the Presiding Bishop's staff to develop and share resources for parishes and dioceses to commit to and work toward this goal, such as the online carbon tracker already created by the Diocese of California, as well as other online and print resources; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$50,000 to fund the development and promotion of these resources.

A088 Commit to the Pressing Work of Addressing Global Climate Change and Environmental Justice

Resolved, the House of _____ concurring, That the 80th General Convention recognize as the Episcopal Church's position that global climate change is not only a scientific concern or environmental issue, but what the United Nations calls "the defining issue of our time... at a defining moment" (UN Secretary General, September 10, 2018), an all-encompassing social crisis and moral emergency that impacts and interconnects every aspect of pastoral concern including health, poverty, employment, racism, social justice, and family life and that can only be addressed by a Great Work involving every sector of society, including the Church; and affirm the commitment of the 79th General Convention to the House of Bishops' 2011 Pastoral Teaching on the Environment as an official position of the church; and be it further

Resolved, That the Church recommit to the work done by previous General Conventions of The Episcopal Church on the pressing moral dimensions of global climate change and environmental justice, including resolutions 2000-D005, 2012-B023, 2015-C013, 2015-C045, 2018-A011, 2018-A018, 2018-A020, 2018-B027, 2018-C020, 2018-C021, and 2018-C064; and that General Convention reaffirm that the Episcopal Church shall support and advocate for policies, programs, pastoral responses, and theologies that work to ensure no community - especially financially impoverished communities, frontline residents, migrants, and BIPOC communities (Black, indigenous, and people of color) - shall bear a disproportionate impact of the environmental, health, and economic threats of climate change; and be it further

Resolved, That General Convention affirm the decision of the United States federal government to rejoin the Paris Climate Accord, while recognizing that the goals set forth in the Paris Accord are only a first step, insufficient in and of themselves to fully contain rising global temperatures and their impacts; and that General Convention direct the Presiding Bishop's staff to continue, through our ongoing role as observers at the United Nations, to participate in all meetings of the Conference of Parties (COP) to the United Nations Framework Convention on Climate Change during the next triennium via delegations selected from an applicant pool and made up primarily of Episcopalians from financially impoverished communities, frontline locations, and BIPOC communities; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$20,000 per triennium to support costs associated with travel to the COP conferences by delegation members who are not members of the Presiding Bishop's staff; and be it further

Resolved, That the Episcopal Church direct the Office of Government Relations and the Episcopal Public Policy Network to advocate for legislation and other public policies that directly address the impact of climate change among marginalized, indigenous, and frontline communities and that tangibly and financially assist those communities with the costs of both climate change and mitigation, and policies that prohibit the authorization and construction of new fossil fuel infrastructure including but not limited to coal, oil, or gas leases on public lands, all forms of mountaintop removal mining, and tar sands pipelines such as Keystone XL, Enbridge Line #3, and the Dakota Access Pipeline; and be it further

Resolved, That General Convention encourage all Church communities, especially parishes, dioceses, camps, conference centers, schools, and chaplaincies, to learn more about the pressing moral implications of climate change in their regions and existing local organizing efforts, then advocate for policies and solutions to address those local needs utilizing and adapting advocacy resources from General Convention and the Presiding Bishop's staff including the Episcopal Public Policy Network, asset map, carbon tracker, liturgical resources, and advocating at the local and state level, and incorporating local nature, environmental justice, and advocacy for creation care into all aspects of community life and Christian education.

A089 Resolution on Divestment & Just Transition

Resolved, the House of _____ concurring, That the General Convention, affirming resolution 2015-C045 and 2018-D081, direct the Episcopal Church and urge the Church Pension Fund to continue to divest all funds from fossil fuel companies and mutual funds including fossil fuel companies, including but not limited to natural gas, oil, coal, and fracking, by 2025 and that these divested funds be reinvested in renewable energy funds and that no fossil fuels funds be purchased in the future, and be it further

Resolved, that dioceses and congregations continue to explore the moral and ethical benefits of divesting from fossil fuel and reinvesting in renewable energy and support their fund managers to act on divestment and reinvestment and be it further.

Resolved, that the General Convention, also affirming resolution 2018-D081 and recognizing that many of our communities and congregations have been grown and sustained by fossil fuel industries, urge a pastoral and practical approach to just transition to new economies, and direct the Episcopal Church staff to form partnerships with existing just transition organizations to support our dioceses and congregations; and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$35,000 during the triennium to facilitate this collaborative work around just transition, and be it further

Resolved, that the General Convention direct the Office of Governmental Relations to advocate for and support public policies that support a just transition for fossil fuel dependent communities.

Continuance recommendation

See Resolution [A086](#) which would continue this task force.

TASK FORCE ON CHURCH PLANTING AND CONGREGATIONAL REDEVELOPMENT

Membership

The Rev. Canon Janet Waggoner, <i>Chair</i>	The Episcopal Church in North Texas, VII	2021
The Rt. Rev. Allen Shin, <i>Vice-Chair</i>	New York, II	2021
Mrs. Natalie Thomas, <i>Secretary</i>	Massachusetts, I	2021
The Rt. Rev. Jennifer Brooke-Davidson	Virginia, III	2021
Mr. Jason Evans	Texas, VII	2021
Canon Katie Forsyth	Eastern Michigan, V	2021
The Rev. Canon Betsy S. Ivey	Pennsylvania, III	2021
The Very Rev. Dr. Gray Lesesne	Indianapolis, V	2021
Dr. Gandhi Lopez	Colorado, VI	2021
Ms. Caroline McCall	California, VIII	2021
The Very Rev. Amy McCreath	Massachusetts, I	2021
The Rev. Eric Metoyer	California, VIII	2021
The Rev. Canon Dan Morrow	Central Pennsylvania, III	2021
The Rt. Rev. Gretchen Rehberg	Spokane, VIII	2021
The Rt. Rev. Alan Scarfe	Iowa, VI	2021
The Rev. Michael Sells	Navajoland Area Mission, VIII	2021
The Rev. Daniel Velez-Rivera	Virginia, III	2021
The Reverend Canon Dr. Ada Wong Nagata	Los Angeles, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Resigned:

The Right Rev. Mariann Budde, Washington, III 2021

Members, inactive:

Dr. Gandhi Lopez Colorado, VI 2021

The Rt. Rev. Jennifer Brooke-Davidson, Virginia, III 2021

Acknowledgements

We express our deep gratitude to the Rev. Canon Stephanie Spellers, the Rev. Tom Brackett, the Rev. Mike Michie, and the Rev. Katie Nakamura Rengers from the Episcopal Church Center, and consultant Mr. Steve Matthews for their collaboration and mutual ministry with us over the past triennium.

Mandate

Resolutions 2018-A005 & 2018-A032

2018-A005 Continue a Church-wide Network for Planting Churches

Resolved, the House of Bishops concurring, That the 79th General Convention and the Episcopal Church celebrate and strategically support emerging communities through the good work initiated by GC2015 – D005 and A012 to develop a church-wide network for planting congregations, training and recruiting planters and mission developers; and establishing new congregations or mission enterprise zones each triennium that are especially committed to mission and evangelism that engages under-represented groups, including youth and young adults, differently abled persons, people identifying as members of LGBTQIA+ communities, people of color, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement; and be it further

Resolved, That the Church honors the holy experiments emerging throughout the Church – experiments that build partnerships within and beyond the church, expand the language of ministry, create new ways to engage the people of God, harvest and share learnings, and lend courage to those leading new ministries and lower the cost of failure through a network supporting mission development; and be it further

Resolved, That the budget for sustaining this church planting network will be \$5,800,000.00 for 2019-2021 to be allocated as follows:

\$200,000 to identify and support existing programs to produce training in planting congregations for clergy and lay leaders

\$600,000 to provide resources for planters of congregations

\$1,000,000 for the development and implementation of a program to train bilingual/bi-cultural lay and ordained leaders in church planting for various cultural contexts

\$500,000 to support a staff person to oversee the planting network

\$3,000,000 for grants to support congregations with the grant depending on the context and need of the congregation; and be it further

\$500,000 in matching funds for the support of leadership development programs for the next generation of church planters and ministry developers; and be it further

Resolved, That the Convention urges The Episcopal Church Development Office to prioritize raising \$6 million per triennium to plant new congregations, so that a network of interested donors will be developed; and be it further

Resolved, That Dioceses receiving money for planting new congregations under this program will contribute significant, resource appropriate, and local funding to support the costs of any new plants; and be it further

Resolved, That the bishop or a diocesan advocate representing any diocese receiving funds shall take part in a cohort of church planting dioceses to share best practices and methods of supporting mission developers, as we all are learning how to nurture new ministries that challenge our assumptions about how to share the gospel with new cultures and generations, and that dioceses not receiving grant funds are also invited to participate in the diocesan cohort; and be it further

Resolved, the Presiding Bishop and President of the House of Deputies continue the advisory group of not more than twelve (12) people, consisting of those with experience in planting congregations, diocesan oversight of such work, working with evangelism and mission, to carry out provisions of this resolution, including making recommendations to Executive Council about grants to be awarded, helping to identify potential planters, and continuing to develop a network of coaches, and working with staff on training church planters, and be it further

Resolved, That the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$5,800,000 for the implementation of this resolution.

2018-A032 Congregational Redevelopment

Resolved, the House of Deputies concurring, That the 79th General Convention requests that the Presiding Bishop and the President of the House of Deputies in consultation with the Church Center staff create a church-wide Community of Practice that works with congregations and their bishops to help them redevelop to better engage the cultural realities of their communities for the sake of launching new ministries and multi-cultural missional initiatives; and be it further

Resolved, That the Communications Office be directed to make a priority of reporting on the stories of redeveloped congregations on an ongoing basis through news media, video, and other means and through developing online resources that provide detailed information about the redevelopment efforts happening throughout the church; and be it further

Resolved, That the cost of this initiative will be equally shared by the church-wide budget, participating dioceses and redeveloping congregations; and be it further

Resolved, That the presiding officers appoint a task force to coordinate this initiative in collaboration with Church Center staff. That task force may be combined with a task force on Church Planting and Missional Initiatives at the discretion of the presiding officers; and be it further

Resolved, That the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$725,000 during the triennium for the implementation of this resolution.

Summary of Work

The Task Force met 20 times over the triennium (as of November 2020), with two of those meetings in person. The global happenings of these particular three years has pushed the whole church, including our Task Force, to embody the agility of the Spirit as the world around us has experienced political and social upheaval, as we have witnessed the rise of nationalism and trends toward isolation, as we have witnessed the unearthing of years of systemic, structural racism, and as we have all experienced the effects of a global pandemic.

We are grateful for the regular discipline of spiritual reflection and community building time at the beginning of each meeting, which helped us to engage our work more richly in the face of broader cultural changes. We truly have felt led by the Holy Spirit as we have navigated the uncharted waters that are church planting, new ministry development, and congregational redevelopment in a tumultuous and changing world.

New Episcopal Communities

Our Task Force's first priority was to continue to build upon the good work completed by the Advisory Group for Church Planting in the 2015-2018 triennium. We found it helpful to clarify what our understanding of New Episcopal Communities (NECs) are:

New: Distinct and different from existing churches and institutions: NECs are not programs of existing churches or dioceses or congregational restarts. NECs have entrepreneurial leadership, a pioneering and creative spirit and seek to bring into being a ministry that was not there before.

Episcopal: Grounded in the faith, doctrine and discipline of the Episcopal church: NECs are clearly, distinctly and overtly Christian in character, approach and identity. They can be churches, mission enterprise zones, or anything in between. While not all will have a worshipping aspect, NECs operate out of and give opportunities to know Jesus' love. NECs are under the oversight of the Bishop and governance of a diocese. They reflect the mission of their diocese and the Episcopal Church.

Community: Designed to be a place of encouragement, care and accountability: NECs commit themselves to love one another in relationships of mutual care and accountability. Patterned after the life and teachings of Jesus, NECs seek to help people grow in faith and life. NECs are committed to long-term growth and sustainability. While not all will be able to become sustainable from the communities they serve, NECs intend to grow in leadership and financial support with proper stewardship, development, facilities and accounting.

With this clear definition, we designed a new ministry planting and granting process for NECs that we believe is more flexible, responsive, and attentive to the call and work of the Spirit blossoming in a particular community and in a way that we can be more supportive at each stage of the new ministry's development. We are grateful for the leadership of staff members from the Episcopal

Church Center, including the Rev. Tom Brackett, the Rev. Mike Michie, and the Rev. Katie Nakamura Rengers, who helped us rethink and redesign this grant process.

Instead of large, upfront block grants, we created and instituted a system designed by the Rev. Mike Michie. Based on his extensive experience in church planting, Michie suggested that progressively larger grants be awarded over time and given in a relationship of ongoing support, mentoring, and connectivity with our grantees. These include:

- **Discernment Grants** of up to \$5,000. These one-time grants are for people discerning a call to start a new ministry. Funds can be used for assessment, research and feasibility studies.
- **Seed Grants** of up to \$30,000 to begin a new ministry, which assists with start-up costs and initial operating expenses of an experimental new ministry after a discernment period is completed and a ministry plan is developed. No matching funds are needed for these grants.
- **Growth Grants** of up to \$30,000 to assist in deeper and fuller development of new ministries as they meet the goals of their ministry plan established in the Discernment and Seed grant phases on their way to sustainability and health. These grants require a significant and appropriate match or other in-kind support provided by the combined contributions of the partner congregation and/or diocese.
- **Harvest Grants** of up to \$40,000 to assist ministries with potential for long-term growth in building capacity and in promoting sustainability beyond grants. These grants require a dollar-for-dollar match or other in-kind support provided by the combined contributions of the partner congregation and/or diocese.

As of December 1, 2020, we have considered 103 applications for granting and support of New Episcopal Communities over the triennium. These resulted in our granting:

- 23 Discernment grants, totaling \$86,500.00
- 46 Seed grants, totaling \$713,551.00
- 23 Growth grants, totaling \$455,000.00
- 11 Harvest grants, totaling \$280,000.00

(Grants will continue to be distributed past the December 1, 2020 Blue Book reporting deadline.)

Our grantees represent 41 dioceses of the Episcopal Church. Many, if not most, of the New Episcopal communities we supported fulfill the General Convention's mandate of ministry with under-represented groups, including youth and young adults, differently abled persons, people identifying as members of LGBTQIA communities, people of color, poor and working-class people, people with a high school diploma or less, and/or people with little or no church background or involvement.

Some are at their very moments of origin, discerning how they are called to embody God's love in their context, while others are in the first few years of existence, developing the leadership teams

which will sustain their ministry. We also worked with some new Episcopal communities who began in the last triennium and are now in the position of being able to mentor other burgeoning plants.

To learn more about the New Episcopal Communities we funded, visit:

<https://episcopalchurch.org/new-episcopal-communities/who-we-have-funded>

In addition to grants, the taskforce supported planters and new ministry developers throughout the Episcopal Church with the goals of:

One, cultivating stronger leaders for the ministry of church planting through improving the ways we identify and develop planters by:

- Developing a pre-assessment workshop for those considering new ministry development, and requiring that assessment as part of the granting process.
- Developing and nurturing a network of coaches experienced in this work, and requiring coaching of our ministries receiving grants.
- Offering one-time online seminars and online drop-in conversations with Church Center planting staff and Task Force members to make the grants process more accessible for those who might be curious, but aren't yet ready to commit to new ministry development.
- Shifting our in-person gatherings from "one-size-fits-all" events to customized training that is focused on particular developmental levels of ministry and cultural contexts.

Two, developing stronger systems of support by nurturing relationships of support for church planters by:

- Improving the way planters interact with their dioceses and bishops for accountability and mutual support. With each grant or renewal, a three-way conversation between the Task Force, a diocesan representative, and the ministry developer is required.
- In partnership with Virginia Theological Seminary, fostering and developing cohorts of ministry developers who meet with each other in colleague groups.
- Connecting with Canons to the Ordinary and other diocesan-level officials to offer mentoring and training on how to supervise, support, and hold ministry developers accountable.
- Developing and writing a New Episcopal Communities What To Expect Guidebook for dioceses, ministry developers, and ministry teams to use.

Three, sharing the story and wisdom of church planting with the wider church by:

- Redeveloping the website of New Episcopal Communities.
- Researching and following-up with grantees from the current and previous triennia for status updates and to glean larger learnings and wisdom.

The effects of COVID-19 on New Episcopal Communities

As the world changed before our eyes with the outbreak of COVID-19, what we have witnessed is that our New Episcopal Communities in the Episcopal Church have much to teach the wider church about being agile as we evolve in, with, and for a world that is very different from the one when our work began in 2018. As a community of people whose vocations have centered on ministry in the wilderness, our ministry developers have particularly modeled for the church how to:

- Understand the “why” of our mission and ministry, discerning the clear reasons God has called us to the particular communities, spaces, and moments we serve.
- Experience failure as an opportunity to learn, restart, and grow.
- Nurture one’s own spiritual life so that we can help others to do the same.
- Listen for God’s call to pivot, change or adapt ministry on the fly.
- Be limber and unattached from particular spaces, expressions, and patterns of worship.
- Trust members of our communities, listening to their wisdom, celebrating the assets of our communities as gifts of God already present in the world.
- Tell our spiritual stories and invite others to do the same.
- Be curious about our neighbors and what the Holy Spirit is already doing with and in them.
- Take intentional time to rest as a way of renewing oneself for vibrant ministry.

The experience of COVID has highlighted the creativity and adaptive skills of our New Episcopal Communities and their leaders. Though some communities have had to delay aspects of their ministry plan, none have ended due to the challenges of the pandemic. New Episcopal Communities that already had some significant roots in their neighborhoods prior to the outbreak of COVID-19 (typically, in existence for two years or longer), had the advantage of already having a critical mass of committed people who could then worship together online. However, many non-traditional New Episcopal Communities of every age are reporting that their community impact has grown significantly during the last eight months. This may be attributed to the fact that these non-traditional New Episcopal Communities have always relied on smaller, less formal, gatherings and less on a principle Sunday worship service. New Episcopal Communities with an emphasis on neighborhood engagement and multicultural communities are especially thriving.

While the health crisis and economic uncertainty of the summer seemed to put a damper on dioceses discerning a New Episcopal Community (the Task Force received fewer grant applications than usual in July 2020), the energy around this work has picked up significantly. We expect to receive many Discernment and Seed Grant applications in 2021. In addition, the next two Discerning Missional Leadership Retreats (assessments for potential church planters) are already full, which indicates that talented leaders are actively discerning a call to entrepreneurial leadership, and developing visions for what new community may emerge.

Congregational Redevelopment

The Task Force has struggled to respond to the General Convention's mandate to create a church-wide Community of Practice that works with existing congregations and their bishops to help them redevelop to better engage the cultural realities of their communities for the sake of launching new ministries and multi-cultural missional initiatives.

In 2018, we sought the buy-in of bishops and diocesan staff members to help us develop our church-wide community of practice, which we named *Missio: Engage!*. We envisioned a cohort of churchwide congregations ready for redevelopment, whose leaders, our "Practicing Community", would come together for a year and a half season of spiritual reflection, training, and coached exercises. These participants would be accompanied and led by a team of "Wisdom Community" practitioners, composed of church planters and ministry developers, spiritual directors, community organizers, and leaders of congregations who had already done this sort of work. After speaking with bishops and diocesan staff members, we learned that many felt this was just another renewal program that would not be substantially different from those already offered in the church (e.g. College for Congregational Development, Congregational Development Institute, InviteWelcomeConnect, FaithWorks).

Since we were not gaining significant traction with *Missio: Engage!*, we decided in 2019 that we would begin with interested individual congregations and congregational leaders instead and work from the grassroots upward. We hired Steve Matthews, a consultant who has experience in congregational redevelopment, to help us connect with prospective congregations who could be a part of our Practicing Community and with individuals who could be part of our Wisdom Community. Under Steve's leadership, we rebranded the *Missio* offering in late 2019 as *Genesis II: Revision and Renew*, and we debuted the first of three planned entry points:

- **Tuesdays at 2:00**, a weekly hour-long redevelopment conversation and laboratory for anyone interested in redevelopment where we explore and try on new behaviors for the sake of one another and our neighbors. No long-term investment is required. As of December 1, 2020, approximately 100 people have attended these gatherings from 67 churches, approximately 21 dioceses. As well, 11 diocesan and institutional staff members have attended.

Unfortunately, the timing of our rebrand into *Genesis II: Revision and Renew* at the end of 2019 coincided with the emergence of COVID-19 in February and March of 2020. The chaos and uncertainty of the COVID pandemic has further limited our ability to connect with congregations ready for redevelopment and substantial re-engagement with their neighborhoods.

The two additional entry points we have planned have not materialized as of December 1, 2020:

- **Coaching Cohorts for Redevelopment** for core teams of 4-5 lay leaders from five congregations who come together twice-monthly on Zoom for 90-minute sessions under the leadership of a coach trained in group coaching and experienced in church leadership. The commitment would be six months.

- **The Practicing Community**, a 15-month initiative engaging a cohort of 12 congregations across The Episcopal Church who are ready to engage in redevelopment for the sake of developing new ministries in their neighborhoods. The Practicing Community would meet online two times a month to learn skills, collaborate as a cohort, and innovate new ways of being church today. The participants would be supported by committed members of a Wisdom Community - mentors, facilitators, and curriculum developers who bring their experience of redevelopment for the sake of new ministries to bi-monthly meetings of participants.

Rather than extending individual grants to congregations, funding allocated by the General Convention for this work has been used to pay our consultant. In September 2020, the Task Force authorized funding for leadership for the coaching cohorts. In spite of the fact that increasing numbers of congregations are signaling their need for redevelopment, it was difficult to gain the focus and momentum necessary to get these cohorts up and running.

Conclusions

Our Task Force was responsible for maturing the good work done in beginning by the Genesis Movement in the previous triennium. Through our work, the Task Force reached the following conclusions about how to further enrich the work of Church Planting and Redevelopment for the sake of new ministry in The Episcopal Church.

The Success of Church Plants Depends on Strong Diocesan Support Networks

Young church plants (and planters) are especially susceptible to being overstretched: pulled by demands of community members, fundraising for their ministry, diocesan expectations, and requirements of previously awarded grants. Being overstretched puts the planter in a vulnerable position. We have learned that we can address this challenge by developing a shared understanding between diocesan leadership (Bishops, Canons to the Ordinary etc.) and the planter with regard to expectations and outcomes of a New Episcopal Community. This shared understanding is created through a covenant, and a conversation facilitated by a third party who has experience with church planting. The conversation is especially important when diocesan leadership has not had the experience of being a church planter.

Discipleship and Worship are Essential Elements of New Episcopal Communities

In this triennium, it became increasingly clear to our Task Force that we want to fund and support New Episcopal Communities that are centered around discipleship and/or worship. This sentiment arose out of a shared belief that the most vibrant New Episcopal Communities are ones who have a deep sense of missional identity which, as followers of Christ, will involve discipleship and/or worship. This is not to say that discipleship and worship have to follow traditional models. In many cases New Episcopal Communities are finding ways of embodying the way of Jesus that are unique to their own context.

Younger Communities Can Teach the Church About Mission Agility

When the COVID-19 pandemic hit the world, churches across our Communion were struck with concerns about maintaining relationships between community members and sustaining a sense of community identity. However, church plants, especially younger communities, reflected to staff and Task Force members that this concern was not as present in their context. We learned that smaller church communities, many in earlier stages of growth, felt less constricted by “business as usual.” The Church can learn from the practice of church plants to form leadership teams rooted in deep relationships. Often we think that bigger is better, and perhaps a smaller yet intricately connected community has the capacity to adapt to always changing realities.

There is a Need for Relational/Structural Clarity in the Church Redevelopment Work

The “Redevelopment for the sake of New Ministries” portion of our work lacked a vigor and intention compared to the mandates focused on Church Planting. The work felt amorphous, in a way that made it hard for members of the Task Force to grasp and implement the goals of the work. When “Missio: Engage!” was proposed to Bishops and other diocesan and parish leaders, their responses made it clear that the challenges facing their congregations were not a match with the Missio approach. Daunting complexities face struggling congregations trying to find new ways forward, including releasing the past, dealing with conflict, visioning new ways forward, and trusting their partners in their local community, as well as their diocese.

We hope that the General Convention will continue to provide financial resources and relational connections that are a catalyst for vision for and innovation in the absolutely essential work of congregational redevelopment. Fundamental building blocks must be put in place if the work of congregational redevelopment is to move forward on a churchwide level—beginning with the identification of a key person (or persons) in each diocese who is dedicated to this work and who has a direct line to the Bishop. In this triennium, lack of clarity in the General Convention resolution itself hampered progress in congregational redevelopment on a churchwide level. Clearer goals and expectations, including specificity around how dioceses engage with this work and what congregations need in order to successfully redevelop, are vital for the future success of this work.

Proposed resolutions

A095 Celebrate and Support the Planting of New Episcopal Communities

Resolved, the House of _____ concurring, That the 80th General Convention and the Episcopal Church celebrates and supports the planting of new congregations and ministries, the training and recruiting of planters and mission developers, and the fostering of a church-wide network of support for new ministry development that was originally funded by GC2018-A005 and GC2018-A032; and be it further

Resolved, that the Church continues to prioritize establishing new Episcopal communities that are especially committed to mission and evangelism engaging under-represented groups, including youth and young adults, disabled persons, members of LGBTQIA communities, BIPOC communities, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement; and be it further

Resolved, that the budget for sustaining this new ministry development will be \$5,800,000.00 for 2022-2024 to be allocated as follows:

- \$200,000 to identify and support existing programs to train clergy and lay leaders in planting congregations
- \$600,000 to provide mentorship/coaching/training for planters of congregations
- \$1,000,000 for the continuing development and implementation of a program to train bilingual/bi-cultural lay and ordained leaders in church planting for various cultural contexts
- \$500,000 to support a church-wide office staff person to oversee the planting network.
- \$3,000,000 for grants to new and existing church plants, to be administered by the Task Force for Church Planting in consultation with the Churchwide Office Staff Officer for church planting.
- \$500,000 for the support of leadership development programs for the next generation of church planters and ministry developers;

And be it further

Resolved, that the Convention urges The Episcopal Church Development Office establish an advisory group to study the possibility of creating an endowment for church plants; and be it further

Resolved, that Dioceses receiving money for planting new congregations under this program will be required to contribute significant, resource appropriate, and local funding to support the costs of any new plants; and be it further

Resolved, that the bishop or a diocesan advocate representing any diocese receiving funds shall take part in a cohort of church planting dioceses to share best practices and methods of supporting mission developers. Those dioceses not receiving grant funds are also invited to participate in the diocesan cohort; and be it further

Resolved, that this Convention embrace the future of our Church by, after this Triennia, moving the funding for a church-wide office staff-person to oversee the planting network (Staff Officer for Church Planting) into the continuing budget for the Presiding Bishop's staff; and be it further

Resolved, that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$5,800,000 for the implementation of this resolution.

A096 Develop Sustainable Congregational Revitalization Ministries

Resolved, the House of _____ concurring, That the 80th General Convention and the Episcopal Church celebrates and actively supports the revitalization of congregations, seeking not to restore past glories, but to move into the new callings of our loving, liberating, life-giving God; and be it further

Resolved, that the Church continues to prioritize the revitalization of congregations and a church-wide network of support for congregational revitalization work that was initiated by GC2018-A032; and be it further

Resolved, that in the revitalization of congregations, the Church continues to prioritize commitment to mission and evangelism engaging under-represented groups, including youth and young adults, disabled persons, members of LGBTQIA communities, BIPOC communities, poor and working-class people, people with a high-school diploma or less, and/or people with little or no church background or involvement; and be it further

Resolved, that the budget for development of sustainable congregational revitalization throughout the Church will be \$2,000,000 for 2022-2024 to be allocated as follows:

- \$100,000 to engage Bishops and the diocesan representative(s) they appoint in development of a framework for congregational revitalization, identifying roadblocks that regularly thwart this work and identifying resources that are proven to enhance this work;
- \$100,000 to engage clergy and lay leaders in gleaning learnings from congregational revitalization that they have successfully done and/or they have failed in attempts to do, identifying roadblocks that have thwarted their work and identifying resources that have enhanced their work;
- \$100,000 for translation services and to facilitate participation of Spanish-speaking lay and ordained leaders in training for congregational revitalization;

- \$200,000 for further development of five-phase congregational redevelopment strategy - (1) diagnosing/assessing resources and challenges, (2) discerning next calling, (3) connecting with local and diocesan partners, (4) iterating and continued resourcing, and (5) evaluating, refining and sustaining
- \$1,000,000 to support a team of local and regional church-wide office staff to oversee the work; and
- \$500,000 to provide mentorship/coaching/training for lay and ordained leaders in revitalization of their congregations.

Resolved, that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$2,000,000 for the implementation of this resolution.

Continuance recommendation

Several important lessons were learned during the last two triennia and inform the following recommendations for future work of this committee or committees with similar missions. **First, we recommend that the work of church planting and church revitalization be separated into two distinct task forces or working groups.** While there are some similarities between these two foci, there are also many differences. Importantly, two separate infrastructures support this work, two separate granting/spending/financial processes are necessary, and two different Episcopal Church Center Staff supervise these distinct areas. While the dual focus of the group has been interesting, it has also been experienced as disjointed. We believe church planting and church revitalization are two of the most important roles of the church at its General Convention. As such, this work is too important, too timely and too far reaching to be given to a single task force or working group.

Regarding church planting, this task force accomplished several important tasks. We continued to support an ongoing network of church planters, coaches, and Task Force members. We developed an updated granting application process, a system for reviewing grants, and made recommendations to Executive Council on behalf of grantees. In general terms, the Task Force had far reaching and influential influence in implementing the terms of the resolution. Regarding church revitalization, however, the committee was tasked with helping implement a resolution that was entirely dependent upon a staff member. While this isn't an issue, per se, it did lead to confusion as to the role of the Task Force itself. **Our second recommendation is that when resolutions are passed to Task Forces, clear instruction is given to the committee as to their role in the implementation of the task force and its mandates.**

Thirdly, we recommend that some current members of the Task Force be seriously considered for future appointments to future task forces or advisory groups. We have experienced a real and positive impact from members of the task force who had previous experience with this work. If it is possible, retaining eligible task force members in the new triennium will help this work continue and continue in a timely fashion.

Our final recommendation is, if it has not already been done, is that **clear guidelines be developed and presented to churchwide groups regarding the work of the development office and how a request can be made of it.** The original text of Resolution 2018-A005 made a request of the development office for the establishment of an endowment specifically in support of church planting. This was not intended to remove church planting from the budget, but rather to support the good work of church planting that does not fit the sometimes stringent demands or particularities of General Convention resolutions. We would still like to study this possibility but are somewhat hindered by the idea that there does not seem to be a clear process whereby a Task Force or a Standing Committee of the General Convention can make requests of an office of the Episcopal Church Staff. We are attentive to the idea that the Office of Development may be charged with many tasks, and we don't want to interfere with any worthy endeavor. At the same time, we also recognize that a Task Force has neither the authority nor the longevity necessary to do the important work of development on its own.

TASK FORCE ON CLERGY FORMATION & CONTINUING EDUCATION

Membership

The Very Rev. M.E. Eccles, <i>Chair</i>	Chicago, V	2021
The Rt. Rev. Larry Benfield, <i>Vice-Chair</i>	Arkansas, VII	2021
Dr. Scott Bader-Saye	Texas, VII	2021
The Rt. Rev. Diane M. Jardine Bruce	Los Angeles, VIII	2021
Dr. Christopher Corbin	South Dakota, VI	2021
The Rev. Canon Catherine Dempsey-Sims	Western New York, II	2021
Dr. Deirdre Good	Maine, I	2021
The Rev. Dr. Robin Hollis	Arizona, VIII	2021
The Rev. Canon Dr. Lang Lowrey	Atlanta, IV	2021
Dr. Gregory Robbins	Colorado, VI	2021
Mr. Marcellus Smith	Alabama, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rt. Rev. Victor A. Scantlebury died 12/04/2020.

Mandate

2018-Do25 Amend Canons III.6.5.g, III.7.5, III.8.5.b, III.9.1, III.10.1.c, III.12.1, III.12.2

Resolved, the House of Deputies concurring, That the 79th General Convention direct the President of the House of Deputies and the Presiding Bishop of The Episcopal Church to appoint a Task Force on Clergy Formation and Continuing Education, including members experienced in theological formation and education, and consisting of a minimum of two (2) bishops, three (3) presbyters or deacons, to include both orders, and five (5) lay persons, who represent the diversity of the Church; and be it further

Resolved, That the Task Force be directed to study the required subjects for the preparation for ordination, including those listed in Canons III.6.5.g and III.8.5.h; and the continuing education of members of the clergy, including Canons III.7.5 and III.9.1; and to study Resolution D025 as originally presented to the 79th General Convention; and to report to the 80th General Convention any proposals for alterations to or consolidation of canons concerning preparation for ordination and continuing education; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$10,000 for the implementation of this resolution

Summary of Work

The Task Force on Clergy Formation and Continuing Education met four (4) times via Zoom conference on 13 May 2019, 10 November 2020, 1 December 2020, and 17 December 2020.

Once familiarized with the Mandate, the group discovered amongst themselves that the requirements for education and training were widely different based on dioceses. Wanting to get a clear understanding of how the canons concerning preparation for ordination and continuing education are being followed and tracked or recorded, it was decided to create a survey to be sent all Diocesan Bishops.

A sub-committee (Dr. Christopher Corbin, the Very Rev. M.E. Eccles, the Rev. Dr. Deacon Robin Hollis, and Dr. Gregory Robbins) worked on a series of questions to be included in an on-line survey (see Appendix 1) created by The General Convention Office.

A portion of the cover letter accompanying the survey read as follows:

The canons currently require training regarding the prevention of sexual misconduct, civil requirements for reporting and pastoral opportunities for responding to evidence of abuse, the Constitution and Canons of the Episcopal Church (particularly Title IV) and the Church's teaching on racism. Our task force is further directed to consider adding "research-based understandings of gender identity an expression and human sexuality" to the required training.

From conversation among the team, it is clear that each diocese has its own way of living into those canons. For us to successfully do our work, we need to know what those ways are...

With the assistance of Mr. Brian Murry, the survey went live on 17 October 2019, and was closed on 15 November 2019.

Forty-six (46) dioceses responded to the survey which (assuming 111 dioceses received it) is a 41.4% response. The Rev. Dr. Deacon Robin Hollis consolidated the information gleaned from the survey.

In subsequent meetings, the Rev. Dr. Deacon Robin Hollis reviewed the focus of the survey, which included, but was not limited to: Gender Equity/Identity/Fluidity, the lack of training standards across the Church and compliance requirements. He also shared the results of the survey. 2018-Do25 was also discussed and it was decided to form two sub-committees; one to do a greater synthesis of the survey (the Rev. Canon Catherine Dempsey-Sims; the Rev. Dr. Deacon Robin Hollis - lead) and a deep dive into 2018-Do25 (Dr. Scott Bader-Saye - lead; Mr. Marcellus Smith).

The work of both sub-committees was used to create the following report.

CURRENT WORDING OF CANON III.8.5 IN MANDATE 2018-Do25

g. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.
4. the Church's teaching on racism.

Do25 proposes inclusion of the following under III.8.5.h (and parallel lists for deacons, bishops, and continuing education

“5. research-based understandings of gender identity and expression and human sexuality.”REPORT AND RECOMMENDATIONS

This committee, based on the mandate “to report to the 80th General Convention any proposals for alterations to or consolidation of canons concerning preparation for ordination and continuing education,” proposes the following alterations.

III.6.5.g

g. Preparation for ordination shall include ~~training regarding~~ *the development of competencies for*

1. ~~prevention of sexual misconduct.~~ *forming communities of racial reconciliation and justice, drawing on the Episcopal Church's teaching on racism.*
2. ~~civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.~~ *forming communities that understand and welcome diverse experiences of gender and sexuality, manifest safe and appropriate boundaries, and implement strategies to prevent sexual misconduct.*
3. the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.
4. ~~the Church's teaching on racism.~~

III.7.5

The Bishop and Commission shall require and provide for the continuing education of Deacons and keep a record of such education *in the Deacon's personnel file. Continuing education shall consist of a minimum of 30 hours of pedagogically engaged courses of study to support ministry and to enhance the continued personal and vocational growth of the clergy.*

III.8.5.h

h. Preparation for ordination shall include ~~training regarding~~ demonstrated knowledge o

~~1. prevention of sexual misconduct~~

~~2.~~ 1. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.

~~3.~~ 2. the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

~~4. the Church's teaching on racism.~~

i. Preparation for ordination shall include the development of competencies for

1. forming communities of racial reconciliation and justice, drawing on the Episcopal Church's teaching on racism.

2. forming communities that understand and welcome diverse experiences of gender and sexuality, manifest safe and appropriate boundaries, and implement strategies to prevent sexual misconduct.

III.9.1

The Bishop and Commission shall require and provide for the continuing education of Priests and keep a record of such education *in the Priest's personnel file. Continuing education shall consist of a minimum of 30 hours of pedagogically engaged courses of study to support ministry and to enhance the continued personal and vocational growth of the clergy.*

III.10.1.c

c. demonstrated knowledge of and competencies for

~~1. prevention of sexual misconduct~~

~~2.~~ 1. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.

~~3.~~ 2. the Constitution and Canons of the Episcopal Church, particularly Title IV thereof.

~~4. the Church's teaching on racism.~~

3. *forming communities of racial reconciliation and justice, drawing on the Episcopal Church's teaching on racism.*

4. *forming communities that understand and welcome diverse experiences of gender and sexuality, manifest safe and appropriate boundaries, and implement strategies to prevent sexual misconduct.*

III.12.1

No change recommended.

III.12.2

The House of Bishops shall require and provide for the continuing education of Bishops and shall keep a record of such education *in the Bishop's personnel file. Continuing education shall consist of a minimum of 30 hours of pedagogically engaged courses of study to support ministry and to enhance the continued personal and vocational growth of the clergy.*

Explanation

1. Changing “training” to “demonstrated knowledge”: Requiring attendance at a training course does not in itself assure that the desired knowledge has been gained. Some trainings are high quality, and some are not. Shifting the language from training to “demonstrated knowledge” names more clearly what is required and makes clear that the knowledge needs to be demonstrated through some means of assessment.

2. Adding III.8.5.i: Some parts of III.8.5.h are primarily knowledge focused (civil requirements, Constitution and Canons) while others imply competency (preventing sexual misconduct and addressing racism). Separating these allows for this distinction to be clear. Adding III.8.5.i gives a place to name and describe competencies needed to form communities that can embody the gospel in relation to issues of race, racism, sex, and gender.

3. Vision of the good: instead of listing “prevention of sexual misconduct” and “teaching on racism,” the canons could more clearly point toward the goal of what kind of communities we wish to create. This orients the formation toward achieving a good rather than just avoiding an evil.

4. Inclusion of sexual orientation and gender identity: expanding the “prevention of sexual misconduct” canon to include “understand and welcome diverse experiences of gender and sexuality” makes clear the importance of church leaders understanding the basic concepts and vocabulary related to sexual and gender diversity, as well as the importance of providing places for inclusion and support for those who may have experienced rejection, shaming, and violence.

5. Continuing Education minimum standard: Many professional organizations and certifications (i.e. driver's licenses) require a renewal process. This is to ensure that those certified are aware of and responsive to changes in operating standards, societal changes, and legislative changes. This applies to clergy in order to continue honing skill sets – especially skillsets to adapt to constantly changing societal, spiritual, demographic, and environmental issues/concerns. This can be accomplished by mandating continuing education (CE). The CE points to the competencies of each order.

The global pandemic and racial unrest in 2020 illustrated an unexpected need to begin or increase the use of technology to integrate worship and congregational communication. Many clergy did not possess the knowledge or skills to pivot to meet the needs of their congregations. This situation supports the requirement for a minimum and consistent standard for continuing education.

The ability for clergy to move between calls and dioceses has become more frequent. A minimum and consistent standard for all required training and continuing education means assures a level of knowledge that can be maintained, and common agendas shared. Local requirements can be added to reflect cultural and local understanding as needed.

Analysis of the survey feedback indicated a need to identify a minimum amount of CE for all clergy. Additionally, a better definition and common language as to what constitutes minimum form of CE is necessary. For example, CE must be interactive (i.e., not just reading a book or watching video) focusing on the ability to encourage self-directed learning with accountability through incentives and/or consequence recommendations. Possible incentives might be:

- Bonus and/or honorarium (in part because Deacons are non-stipendiary)
- Scholarship money for further studies or courses
- Gift certificate
- Honor roll of recognition at a diocesan convention

The survey also exposed there are no substantive consequences or minimum standards for not completing the required learning. Potential consequences could be:

- Reprimand in file
- Ineligibility to stand for Diocesan office
- Limitation placed on opportunities to move assignments or cures

6. Need for a minimum consistent standard for a “Human Gender and Sexuality” curriculum: to support minimum requirements, common language and definitions are needed to ensure TEC is addressing the same issues in all dioceses. The ability to use TEC’s economies of scale, expertise and programming to create a curriculum which teaches an understanding of human gender and sexuality that goes beyond simply watching a video and printing a certificate is paramount. With this focused effort, a minimum level of demonstrated knowledge and understanding using common language will allow clergy to share, teach, and preach more effectively. Within TEC, the use of “Sacred Ground” and listening circles are proving effective in deepening and broadening understanding issues of racial injustice and plausible solutions. The use of a similar approach regarding human gender and sexuality (adapted for local use) could be expected to have a similar result.

7. Recommendation for consistent/standard online tracking of training: To ensure compliance and assess the efficacy of required continuing education in today’s fast-paced and cross-cultural environment, a technological resource is needed. Again, using TEC’s economies of scale, creation of a TEC-level recording/tracking system of competency-based education and a learning record (CLR)* for all clergy is critically important.

* Footnote:[Learning Record] Open Standard Comprehensive Learner Record (CLR). It is an open-source, secular system, reportedly superior to Moodle. CLR defined: The Comprehensive Learner Record (CLR) is the new generation of secure and verifiable learning and employment records supporting all nature of academic and workplace recognition and achievements including courses, competencies and skills and employer-based achievements and milestones.

A potential solution other task forces are currently reviewing include competency-based theological education. One example is Pathways for Baptismal Living, a comprehensive process for discerning and answering the Call. Led in part by Bexley-Seabury Seminary Federation, we understand this suggestion has support from Association for Theological Schools (i.e., new standards and regardless of where the formation comes - seminary, local, 3rd party like IONA, CALL, etc.).

TASK FORCE ON COMMUNION ACROSS DIFFERENCE

Membership

The Rt. Rev. John Bauerschmidt, <i>Convener</i>	Tennessee, IV	2021
The Rev. Canon Susan Russell, <i>Convener</i>	Los Angeles, VIII	2021
Ms. Megan Allen	Ohio, V	2021
The Rt. Rev. Gregory O. Brewer	Central Florida, IV	2021
Mr. Fred Ellis	Dallas, VII	2021
The Rt. Rev. Thomas Ely	North Dakota, VI	2021
Mr. Miguel Escobar	Long Island, II	2021
The Rev. Scott Garno	Albany, II	2021
The Rt. Rev. Mary Gray-Reeves	North Carolina, IV	2021
Ms. Anna Haeffner	Southwest Florida, IV	2021
The Rev. Canon Jordan Hylden	Dallas, VII	2021
The Rt. Rev. Moises Quezada Mota	Dominican Republic, IX	2021
The Rev. Canon Tanya Wallace	Western Massachusetts, I	2021
Dr. Christopher Wells	Dallas, VII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-A227 Communion Across Difference

Resolved, That the 79th General Convention direct the Presiding Bishop and the President of the House of Deputies to appoint jointly a Task Force on Communion across Difference, consisting of not more than 14 people, who represent the diversity in this Church including members from countries other than the United States; and be it further

Resolved, That half of the members appointed hold that marriage is a “covenant between a man and a woman” (BCP, 422), half of whom hold that marriage is a “covenant between two people” (Resolution 2018-A085), in the presence of God, and that all of those appointed seek a pathway toward mutual flourishing in The Episcopal Church; and be it further

Resolved, That the Task Force seek a lasting path forward for mutual flourishing consistent with this Church’s polity and the 2015 “Communion across Difference” statement of the House of Bishops (<https://www.episcopalchurch.org/library/article/mind-house-bishops-statement-‘communion-across-difference’>), affirming (1) the clear decision of General Convention that Christian marriage is a

covenant between two people, of the same sex or of the opposite sex, (2) General Convention's firm commitment to make provision for all couples asking to be married in this Church to have access to authorized liturgies; and also affirming (3) the indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness the Church needs; and be it further

Resolved, That the Task Force consult widely with members of this Church who represent its diversity of cultural background, age, race, gender, gender identity, and sexual orientation, particularly its members in countries other than the United States; and also with representatives reflecting the diversity of views and voices of the Anglican Communion, our full-communication ecumenical partners, and those churches with whom we carry on ecumenical dialogues; and be it further

Resolved, That the Task Force report and make recommendations to the 80th General Convention, ending its term at that time except by further action of General Convention.

Summary of Work

“Put Out into the Deep Water”: Communion across Difference as a Christian Call

Preface

In 2018, General Convention granted churchwide access to authorized marriage liturgies for all couples (Resolution 2018-B012). At the same time, General Convention sought to identify a “lasting path forward for mutual flourishing” upon which both a majority of Episcopalians and a decided minority could walk together despite disagreeing about marriage (Resolution 2018-A227). For the latter purpose, the present task force was appointed, composed equally of those who hold the theological view that Christian marriage is the union of two people regardless of gender, and those who support the view that Christian marriage is only between one man and one woman. As Resolution 2018-A227 made clear, this work would need to be consistent with the Church's polity, consonant with General Convention's clear decision about marriage, and careful to protect the “indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness the Church needs.”

At our first and only face-to-face meeting, we articulated the following commitments⁽¹⁾ as part of a working definition for mutual flourishing:

To grow together in mutual love, affection, and trust, recognizing our differences;

To honor the polity of The Episcopal Church and the authority of the General Convention;

To respect the dignity of one another as we engage the challenging work of discernment and transformation, so that all members, faith communities, and dioceses of The Episcopal Church may experience an equal, indispensable, and unqualified place and voice in the shared Body of Christ;

To speak and listen to one another and strive, wherever wounds may exist, to do all in our power to labor together toward reconciliation, walking together in the way of love so that God's reconciling mission may flourish;

To pray without ceasing for one another and for God's grace to guide us more deeply into loving relationships.

In turn, we have sought to understand and describe something of the richness of Christian reconciliation, and our persistent communion with one another, even "across" important differences. This is hard work, and we believe it must continue beyond the current triennium. We are energized both by the dialogue, rooted in our common life in Christ, and by the opportunity to "put out into the deep water" (Luke 5:4), where we can learn together the ways of discipleship for the building of the Church. As Jesus said to Simon Peter: "Do not be afraid; from now on you will be catching people" (Luke 5:10)!

With this hope, we have organized our work under three headings, each of which addresses a very real question:

Call to Communion across Difference: How do reconciliation and communion across difference reveal our common sharing in the life, death, and resurrection of Jesus?

Life Together: Virtues and Practices: Can we commend particular practices of life together that reflect our call "to restore all people to unity with God and each other in Christ" (BCP, 855)?

The Path of Mutual Flourishing: Walking Together: What specific steps can we take along a "lasting path forward for mutual flourishing," given our commitment to protecting an equal place and voice for one another in The Episcopal Church?

1. Call to Communion across Difference

"If then there is any encouragement in Christ, any consolation from love, any koinonia in the Spirit, any compassion and sympathy," St. Paul wrote to the church in Philippi, "make my joy complete: be of the same mind, having the same love, being in full accord and of one mind" (Phil. 2:1-2). The koinonia, or communion, of Christian life together consists in our sharing in Christ, who teaches the way of compassion and sympathy by himself modeling them. We learn to follow this way of Jesus through devotion "to the apostles' teaching and to fellowship (koinonia), to the breaking of bread and to prayer" (Acts 2:42), which together constitute the Church's communion of love. By these means of grace, and in the Christian life of neighbor love that flows from them, the followers of Jesus hope for glory, and are enabled to persevere with joy along the pilgrim way.⁽²⁾ In every case, God goes before by claiming us, and teaching us to claim one another. This is the mission of the

Church: that God “reconciled us to himself through Christ and has given us the ministry of reconciliation” (2 Cor. 5:18; cf. BCP, p. 855).

Our presiding bishop speaks of reconciliation as “the spiritual practice of seeking loving, liberating and life-giving relationship with God and one another, and striving to heal and transform injustice and brokenness in ourselves, our communities, institutions, and society.”⁽³⁾ We wish, in what follows, to reflect on this very practice of reconciliation, and to apply it to the task with which we have been entrusted, to “seek a lasting path forward for mutual flourishing,” recognizing that the path has, in important respects, yet to be found. We, the members of this task force, accept that communion and reconciliation already form the basis of our life together in Christ. We have not yet arrived, however, at a “lasting path” for our common pilgrimage. We do not always find ourselves at the same point along the road. Sometimes we disagree about the path itself, where exactly it may be found, even when we share a sense of common mission along the way.

Seeking deeper communion across difference, we hope to be conformed more fully and deeply to Christ and to one another, doing “nothing from selfish ambition or conceit, but in humility regard[ing] others as better than [our]selves” (Phil. 2:3). In the present context of disagreement about marriage, we have asked how we can “look not to [our] own interests, but to the interests of others” (Phil. 2:4). How, in the words of our working definition for mutual flourishing, can we put our respect for one another’s dignity to work, so that all may find in The Episcopal Church an experience of equality and indispensability, and therefore feel both at home and heard (“place and voice”)?

It is helpful to recall that communion comes in several forms, all of which are overlapping to one degree or another, even as they also demonstrate our differences and disagreements.⁽⁴⁾

A first, most basic form of communion is baptismal, rooted in profession of the baptismal or Apostle’s Creed. To profess the creed, and be made one in Christ in baptism, is to share a common membership in the one Body of Christ across space and time. Here, we may speak of basic Christian orthodoxy, rooted in the apostolic faith of the early and undivided Church.

A second kind of communion is ecumenical, given the reality of distinct denominations or churches within the Body of Christ. Most churches today have little trouble recognizing Christians who belong to other churches as fellow members of the Body of Christ. In most cases, we ourselves did not initiate the divisions between us; we inherited them. And yet very real, often painful disagreements about important matters touching on the Church’s faith and order also conspire to keep us apart. At our best, we see one another as a large, though no-doubt divided, extended family in Christ, but we do not yet share all things in common (cf. Acts 2:44). We share the communion of baptism and (usually) a basic, creedal faith, but still seek restoration of the fullness of unity.

A third kind of communion is denominational. Here, Christians of a particular tradition commit to walking together with “the same mind, having the same love, being in full accord,” as St. Paul says (Phil. 2:2), which has meant for most churches that faith and order are shared in their entirety. As in The Episcopal Church and other churches of the Anglican Communion, beliefs are spelled out in canons, and common structures are adhered to, including structures of governance and decision-

making. Ostensibly, the communion is “full,” and more than that, the church is singular and unitary, not differentiated. In most instances of denominational communion, this means that little or no variation is possible, either in terms of belief or practice, unless looser structures permit more local patterns of decision making, or some other suitable accommodation of disagreement is found in the name of tolerance or breadth.

In point of fact, Anglicans, and Episcopalians in particular, have often laid claim to tolerance and breadth, and we historically have learned to put up with a good deal of doctrinal diversity, especially between self-nominated parties and schools. As the long 19th century gave way to considerable tumult in the 20th, Episcopalians and global Anglicans, working side by side, laid claim to—and often led—the burgeoning ecumenical movement, turning erstwhile inter-ecclesial swords into plowshares of hopeful reconciliation. Ripples of interest in this work arose in The Episcopal Church starting in the 1850s and crested in the wake of the devastating Civil War, the horror of which made Christian unity seem urgent. With the gospel at the forefront, leaders like William Augustus Muhlenberg and William Reed Huntington, priests who resisted party affiliation, began to imagine that different, even incompatible perspectives could sometimes complement each other on the way to revealing the whole truth. Huntington’s *Church Idea* (1870) helped inspire the tidal wave of distinct “memorials” that crashed into the General Convention of 1886, submitted by the dioceses of Florida, Indiana, Kentucky, Louisiana, and another signed by roughly one thousand clergy and two thousand lay persons, each calling in its own way for a prioritization of “Christian re-union.” The General Convention assembled an Episcopal Committee on Christian Unity on the fly, and on the 13th day of the Convention, the Bishop of Long Island presented a report, part of which now appears among the Historical Documents in the 1979 Book of Common Prayer, including the so-called “Chicago Quadrilateral.”⁽⁵⁾ Rightly remembered as an orienting text for the ecumenical movement of the next century, the Quadrilateral steadily shaped Anglican ecclesiology as well by proposing principles that could guide a nascent Communion consciousness. Arising from an American context of inter-denominational self-awareness and a pragmatism placed in service of the gospel, Episcopalians seeded the notion that structural differences might be accommodated both between and among Christian denominations.

In the important prologue to the Quadrilateral as published by the General Convention in Chicago, the House of Bishops addressed itself “especially to our fellow-Christians of the different Communion in this land,” in order to “solemnly declare” The Episcopal Church’s readiness “in the spirit of love and humility to forego all preferences of her own.” Rather than seeking “to absorb other Communion” into The Episcopal Church, we would attempt to cooperate with them “on the basis of a common Faith and Order, to discountenance schism, to heal the wounds of the Body of Christ, and to promote the charity which is the chief of Christian graces and the visible manifestation of Christ to the world” (all from BCP, pp. 876-77). Grand language, to be sure, and also inspiring for Anglicans and other Christians the world over to read and contemplate. Coming to the four-part program for which the Quadrilateral is named and best remembered, the final point seemed to stick the landing in an impressive, if underdeveloped fashion. The historic episcopate, a calling card for

Anglicans the world over, might be “locally adapted in the methods of its administration to the varying needs of the nations and peoples called of God into the unity of His Church” (p. 877). Underdevelopment has its benefits, as it enables experimentation, flexibility, and a readiness to learn from others in a spirit of missiological exchange. Ever since the Lambeth Conference made the Quadrilateral its own in 1888 (see BCP, pp. 877-78), Anglicans have continually recurred to its principled ideals to capture something of its potent promise, both ecumenically and with reference to our own life together across difference.

In this perspective, the challenge before the present Task Force is not only not new but also plays to a strength of The Episcopal Church, for which we are renowned. Can we view our present disagreements through the lens of a given communion in Christ, and can we imagine ways of walking together that enact the respect, forbearance, and Christian love to which we have long committed ourselves? Stated in terms of the foregoing kinds of communion: since we share an initiating and transformative communion in Christ and “have left everything to follow” Jesus (Mt. 19:27), can we express this faithfully despite, and even through, our disagreements over marriage? Can we imagine ways of living together, both affectively and structurally, that will accommodate our difference, and permit us still to say that we share a common faith and order as Episcopalians and as Anglicans — while peering, like our forebears, over the horizon to the larger body of Christ? Finally, if our differences seem quite fundamental, as this Task Force believes they are, might we nonetheless find some old or new means of flexibility (“local adaptation”) that could permit us to carry on in one church and one Communion? If so, our witness may again be heard as resounding testimony to the love of Christ in a time of great division in our country, our Communion, and our world.

The pages that follow show where our work has led us, in common prayer and discernment. We have taken to heart the most-serious call to unity and to Christian friendship, modeled by Jesus (see John 15:15), who died for us. We want to be together, to remain together, to walk together, when we can, and to guard and protect the path for one another even when we need to take some space or walk at different paces. We have sensed that this is a call from Jesus himself, who is our Way of Love.

We seek, as faithful Episcopalians, mindful of the wider Anglican Communion in which we have been placed, to try to find a way to live together in peace that will be a blessing both to ourselves and to those we are called to serve. God helping us, we seek to “put out into the deep water” because we dare to hope that we also, all together, may be given a great harvest of fish, even to the point that our nets begin to break; even when we are tired, having “worked all night long but caught nothing” (Luke 5:4-6). Lord, we believe. Help our unbelief!

2. Life Together: Virtues and Practices

A. Virtues to Embrace

In the conviction that we have already been called by God and remade as members of Christ’s body, we want now to say something more about life in the Church as a God-given school in communion and reconciliation. Are there practices to which we are committed, or that we might take up, that

already and prospectively demonstrate our “mutual responsibility and interdependence in the Body of Christ,”⁽⁶⁾ that can help us sustain communion across difference in the Episcopal Church and beyond? To ask this question is to start to explore the texture and pattern of Christian life together, described variously in Scripture as a call to peacemaking (Matt. 5:9; Rom. 14:19) and forgiveness (Eph. 4:32), to justice, mercy, and humility (Micah 6:8), and to Spirit-inspired fruitfulness, namely, “love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control” (Gal. 5:22-23; Luke 19:42). That Christians are called to such work suggests both that it needs doing and that we might not otherwise get around to it or find it appealing, if left to our own devices. Differences, disagreements, and difficulties between fallen human beings are to be expected. The way of love, which is God’s own faithfulness in Christ, provides “the way out,” as a path of endurance and blessing (1 Cor. 10:13 and following).

We start with the virtues that help to sustain Christian communion. Classically, a virtue is a stable quality of character. One is loving, brave, honest, or merciful as a pattern of life. For Christians, virtuous living depends upon Christ as exemplar and means, set within a sacramental pattern and the gift of communal constraint itself. “Increase in us,” we pray, “the gifts of faith, hope, and charity; and, that we may obtain what you promise, make us love what you command” (BCP, p. 235).

Love

Above all else, Christians are called and commanded to love God and neighbor, as God loves us (Mark 12:30-31; Eph. 5:2). In fact, love begins from a recognition of union as God’s own act, rooted in the Passion of Christ, who loves us “to the end” (John 13:1). Abuse has no place in loving relationship. Under all circumstances, truth must be sought and prized, even when it seems hidden away. Love strives to listen well, to build up and not destroy, to repent and forgive, and to repair bonds of affection when they fray. Love wishes to bear witness rather than defeat or erase, even when it perceives grave error. As it imparts a spirit of sacrifice, love serves as the wellspring and nursery of all other virtue (1 Cor. 13).

Patience and forbearance

“When you come together to eat, wait for one another” (1 Cor. 11:33). By this injunction, St. Paul urges patience with our inevitably frustrating siblings — and patience with ourselves, as we pray for the grace to advance in wisdom and truth, subject to the Spirit of mercy. Tolerating a degree of messiness comes with the territory of Christian life, on the way to renouncing vice and growing in virtue. Forbearance names, from another angle, what putting patience into practice looks like, as a loving accompaniment of those whom we believe to be mistaken or seemingly insufferable, out of reverence for Christ (Matt. 25:31ff.). Patience does not turn a blind eye to falsity, tolerate injustice, or otherwise accommodate sin. Relying on the “full armor of God” (Eph. 6:10-18), patience rests in the confidence of God’s power to change hearts and form consciences (John 16:8), without resort to human coercion.

Zeal

Seeking communion across difference does not amount to a laissez-faire attitude about biblical faithfulness, holy living, true doctrine, justice for all, or full inclusion. We on the Task Force are zealous about these matters, and we will not give that up. Fierce conversations should be welcome in the Church, resourced richly by Scripture, the tradition of Christian teaching, and reasoned reflection on the experience of the faithful. Zeal for truth, holiness, and justice can easily turn into intolerant zealotry when not joined with love, patience, and forbearance, but joined with them zeal is a virtue and not a vice. Zeal requires courage, as any struggle for what is true and good will meet many obstacles over the long haul. “Be steadfast, immovable, always excelling in the work of the Lord,” urges St. Paul, “because you know that in the Lord your labor is not in vain” (1 Cor. 15:58).

Justice

It is sometimes forgotten that justice is a virtue, not only a state of affairs in which everyone receives their due. Following the example of Jesus, the just Christian truly wants to treat all persons with the utmost fairness, to hear them out, and to see that justice is done in those places where injustice persists. This means that the just person will both be committed to struggles for justice in the Church and our civic communities and be committed to treating everyone in these struggles justly, even when we think others are deeply mistaken. The just person will respect the dignity of every human being, as we pledge in our Baptismal Covenant.⁽⁷⁾

Humility

In our zeal for truth, holiness, and justice, we also need humility to admit when we are wrong, even about important matters. Humility serves the virtue of teachableness, which is the willingness to admit that we have much to learn, and that our minds will change as we listen to others. Humility also inspires repentance and penance. Humility is not thinking less of ourselves, but more like thinking less about ourselves — taking the focus off of our own egos and moving past defensiveness. Humility avoids the arrogant certitude of self-righteousness and is willing to admit “I was wrong. I’m sorry I hurt you. How can I make this right?”

If we are filled with such fruits, we will have no great love for conflict, controversy, and winning victory over those we may consider enemies. We will enter into conflict reluctantly and always on the way to reconciliation and restored communion. The virtuous Christian, formed by love of God and of one’s fellow members in Christ, will have the prudence to know what to do and how to do it in the many challenges of life together. Such a person will know the “things that make for peace” (Rom. 14:19) in the midst of conflict and strive to edify the whole body. Without love, and the associated virtues for which we pray to God, every effort we make at communion across difference will fail.

B. Practices to take up

The above Christian virtues are not qualities of character that can be had simply by choosing to have them but instead are formed in us by God’s grace through the Church’s communal practices. As such,

we will now proceed from our overview of the virtues that make for peace to consider four practices of the Church that form us in those virtues. For each practice, we will offer examples of what we mean. No doubt, other examples could be identified, but we provide these to spark the imagination and to encourage members of our church to create more of their own.

1. Common prayer, Scripture, and teaching

“They devoted themselves to the apostles’ teaching and fellowship, to the breaking of bread and the prayers” (Acts 2:42). As Anglicans, we must start here, formed as we have been for centuries by a Book of Common Prayer and the Bible. Narratives have the power to connect, encourage, and transform us. We experience this in our sharing of the saving realities of Baptism, Eucharist, and the Daily Office, which are enacted in our common liturgical practice and prayer. Our common life is experienced by many Episcopalians and other Anglicans as powerfully drawing us together through the shared narrative of Holy Scripture. And while our common prayer brings together Episcopalians from a wide array of locations and backgrounds, we are able to recognize in each other a shared commitment to the beliefs and practices that the BCP sets forth, even if we might understand or emphasize some of them differently. This is as it should be. To avoid common prayer because of our differences is to enact division rather than seek unity.

When we encounter Jesus Christ in Holy Scripture, we participate in an alternative reality that would bind us together rather than divide. Sometimes, the stories that people tell about their identity and experience are pitched as rivals to other group narratives, rooted in deep wounds and grievances: think, for instance, of Protestants and Catholics in Northern Ireland or partisan politics in the United States. Yet when we are able to share our stories and tell our truths within the wider biblical story of what God in Christ has done to create and reconcile us as one family, it becomes possible to share our stories in a way that brings us together rather than keeps us apart. To this end, this Task Force encourages the sharing of personal narratives and experiences in the context of common prayer and Holy Scripture, to build up our mutual understanding and cultivate awareness of how Christ brings us together and calls us to the work of reconciliation.

An example of this can be found in the Engagement across Difference initiative in the Diocese of Los Angeles: a three year diocesan-wide commitment to a narrative based process including prayer and the reading of Scripture, focused on understanding, healing, and reparation. Another example is the Communion across Difference Facebook page created by our Task Force, which has over 1,800 members. While this page did encourage many to share stories and seek mutual understanding, the limitations of social media were clear insofar as some conversation threads did not achieve mutual understanding in charity. This speaks to the importance of gathering in person and, again, should inspire us to make prayer, Scripture, and teaching the ordinary norms for our life together.

2. Common service

While it may take many forms, the shared work of Christian service is critical for deepening bonds of communion across difference. As is well known, service forms would-be disciples into fit servants,

not least as Christ-like friendships naturally grow from the soil of common mission. The very act of service transforms all who are involved, far beyond the immediate purpose of the project at hand.

One example was the three-way partnership between the dioceses of El Camino Real, Western Tanganyika, and Gloucester from 2008-2015, initiated specifically to engage their significant differences in point of view regarding human sexuality. Representatives from the three dioceses gathered for worship, conversation, and acts of Christian service, all of which nurtured mutual understanding and bonds of affection. Along the way, they learned how much they shared in Christ, even though differences and some degree of distance remained. Today, friendship and conversation continue between them, even though that particular dialogue and its projects were completed.

While not a panacea, Christian service always helps to foster trust, common purpose, and friendship, all of which are essential to Christian communion in its fullness. In our differences, there will be areas of service in which we inevitably diverge; we will not all be able to join Anglicans for Life and the Religious Council for Reproductive Choice at the same time, for instance. This makes those areas in which we do converge all the more important. As we seek to grow into the beloved community Christ calls us to be, the Task Force encourages more forging of relationships and common service across difference, particularly with those we may not see as obvious partners.

3. Cultivating common bonds of affection

Building relationships, especially across difference, is indeed a practice that requires intentionality. We naturally gravitate toward people who look, think, and act like us. But when we take seriously our shared experience of Christian narrative, prayer, and service, we make it a point to seek out genuine relationship with those in the body of Christ with whom we might seem to share little in common. As we have begun to experience on this Task Force, the practice of forming bonds with one another changes us over time. We learn that people with whom we disagree are not simply caricatures, but complex and thoughtful persons about whom we care. Without the cultivation of such connection, we are liable to prefer division to reconciliation, and to focus on what keeps us apart rather than what unites us.

While there are many avenues to building relationship, we encourage participation in guided practices centered in the local context, where people can engage together in sacred truth telling across differences. Early in the course of our work, the present Task Force developed an exercise grounded in our working definition of mutual flourishing. More recently, Presiding Bishop Curry has highlighted resources for racial reconciliation and healing that we commend for any conversation across difference.⁽⁸⁾ All of these are included in the Supplemental Materials section of this report. While trust and safety build over time, we believe that there is value in hearing in plain and clear language the “truth” of what each “side” of a conflict or disagreement wants or needs for itself, as well as what it needs or wants from the “other” side. As we have experienced in our conversations as a Task Force, this kind of frank conversation, including honest discussion about how we feel we have been wronged or hurt, is a critical part of the truth telling that is a prerequisite for genuine

reconciliation. Our hope is that through speaking our truth to one another we will grow in our common desire for deeper communion and reconciliation.

4. Discerning the common good

Episcopalians and other Anglicans have long had a rich conception of the ecclesial common good. We are not simply individuals who happen to like liturgical worship, but Christians committed to accepting Christ as Savior and serving Christ as King “in the fellowship of His Church,” as Archbishop Temple’s famous definition of evangelism puts it. We share the Church and communion with the triune God and are continually remade to love God and our neighbors through the effective power of the Incarnation, death, and resurrection of Jesus Christ.

If this is so, then what we are doing when we debate some disputed point is not simply seeking to advance an individual agenda or to further some party position, but always first and foremost discerning the common good of our whole church. We readily admit the difficulty here, since we often do not agree on what that common good amounts to. We must not surrender this call, however, which means that we must learn to make it a habit. In what follows, we will suggest two practices that can form us as persons who genuinely seek the common good of God’s Church, rather than simply our own private goods or the good of a partisan sub-set of the whole.

C. Seeking outcomes acceptable to all

In any setting in which decisions are made by vote, majorities and minorities can find themselves locked in pitched battles that end in bitterness and alienation. To be sure, routine matters of business do not present much of a problem in this regard; one hopes that all could live with a decision to shift headquarters from New York to Chicago, notwithstanding preferences one way or the other. Problems emerge, however, when the point at issue carries existential and/or conscientious import for majority and minority alike. Proceeding with an unnuanced decision in such a case may lead to the exit of minority members from the community, both individually and en masse.

The Episcopal Church lacks at present an adequate practice of seeking out and listening to minority voices in a bid to accommodate their concerns. To be sure, exemplary instances may be found, one of which was the conversation leading up to Resolution 2018-B012 at the 79th General Convention. Both before and during the convention, self-described progressives and conservatives on the matter of marriage sought one another out to find a path forward that would be acceptable to all concerned.⁽⁹⁾ While we did finally reach such an agreement, the process was frankly painful and bruising for some on both sides, as mistrust, alienation, and perceived disrespect hindered, and nearly derailed, the work at several points. We have started to speak honestly about these hurts on this Task Force and striven to hold one another’s perspectives in a sacred trust, to listen non-defensively, and to apologize for the hurt we caused, as we are able.

Some members of our Task Force who participated in these conversations testify that the ground had been prepared, as well, by indaba groups in the House of Bishops, following the lead of the 2008

Lambeth Conference, as a means of seeking consensus through Bible study, prayer, and conversation in lieu of winner-take-all outcomes.⁽¹⁰⁾ We urge the church to normalize this kind of practice in our deliberations, whenever disputed questions are felt to carry an immediate, personal urgency.

While this commendation clearly applies to all our disputes about marriage and sexuality in the last forty years, it stands on its own as a principle worth preserving for other pressing matters as they come along. If we follow the lead of Resolution 2018-A227, the practice of seeking outcomes acceptable to all will typically involve making a clear decision at a churchwide level, while seeking to accommodate minorities for whom the decision carries conscientious and/or existential weight. The nature of those decisions and accommodations will of necessity vary from case to case. The important thing is committing to a practice that will be followed and respected by all, on the way to discerning the common good of the whole rather than simply a part.

D. Discerning together the mystery of God's will

Legislative assemblies like General Convention are, by definition, outcome oriented, as well-crafted resolutions developed in committees, thoughtful debate, and broad coalitions enable leaders to discern, as best they can, the mind of the church at a given time. Local and regional synods have always been thus, set as they are within a wider testing of the faithful (*sensus fidelium*) over time, on the way to universal agreement. God's mysterious will is difficult to discern. Viewed in this way, we see the importance of flagging local and regional councils as provisional in nature, always awaiting wider reception over time, through which, we trust, wisdom will prevail in the Spirit-inhabited catholic and apostolic Church.

Seminaries, conferences, journal symposia, Bible studies, and many other such common pursuits enable Christians to take counsel about matters of concern. Here the point is less about outcomes than it is formation, fed by careful study, deliberative discernment, and collegial conversation, always set in a context of common prayer. Patience, commitment, humility, and perseverance are all required in this work, which will not be accomplished in a single triennium, nor indeed by one task force, with or without Zoom. Deliberative, non-outcome-oriented discernment, like love, never ends, but rather provides a healthy diet for a fit and properly functioning body (1 Cor. 13:8; cf. 12:12ff.).

A case in point is the recent consultation sponsored by the House of Bishops Ecclesiology Committee and hosted by Virginia Theological Seminary, "When Churches in Communion Disagree."⁽¹¹⁾ Here, a number of leaders from The Episcopal Church and the wider Anglican Communion, including some members of this Task Force, gathered to "explore strategies for maintaining unity within the Anglican Communion in the midst of deep theological differences."⁽¹²⁾ In her paper on "the grammar of communion," Professor Katherine Sonderegger compared our differences over marriage to the disagreement between Franciscans and Molinists, which perdured for hundreds of years before finally achieving recognition as acceptable schools of opinion within one church. Other papers from a variety of perspectives similarly sought to make theological sense of our disagreements and divisions, without immediate recourse to resolutions or political considerations.

Many other examples could be named. On all counts, the key is non-outcome-oriented deliberation across difference about fundamental issues for our common life, fed by a spirit of cooperative inquiry. Such a practice may be especially important for theological and other minorities, as a way for their voices to be heard and understood by majorities. Step by step, waiting for one another, we may confidently expect to be “transformed by the renewing of [our] minds, so that [we] may discern what is the will of God — what is good and acceptable and perfect” (Rom. 12:2).

3. The Path of Mutual Flourishing: Walking Together

For more than 40 years, The Episcopal Church and Anglican Communion have labored to discern wisely and come to agreement regarding matters of human sexuality, sexual orientation and gender identity, the meaning of marriage, and larger questions about how decisions are made and the limits of diversity. In an important sense, none of this is fully settled: disagreements remain, debate continues, and many questions about next steps remain unanswered, even as working answers in both the Episcopal Church and Anglican Communion are in place, writ in terms of majority and minority views. We wish now to focus specifically on The Episcopal Church and try to describe the present reality of “communion across difference” following the last several General Conventions. What progress have we made and what outstanding questions and differences remain?

Here are the principal actions of the last two General Conventions regarding marriage, common prayer, and communion across difference:

- Resolution 2015-A036: Amend Canon 1:18 [Of the Solemnization of Holy Matrimony]⁽¹³⁾
- Resolution 2015-A054: Authorize Trial Use of Marriage and Blessing Rites in “Liturgical Resources I”⁽¹⁴⁾
- The 2018 Blue Book Report from the Task Force on the Study of Marriage, including Canon Jordan Hylden’s appended minority report⁽¹⁵⁾
- Resolution 2018-B012: Marriage Rites for the Whole Church, including matters referred to the Standing Commission on Liturgy and Music (SCLM) from Resolution 2018-A085, submitted by the Task Force on the Study of Marriage⁽¹⁶⁾
- Resolution 2018-A227: Task Force on Communion Across Difference⁽¹⁷⁾
- Resolution 2018-A068: Create a Task Force on Liturgical and Prayer Book Revision⁽¹⁸⁾

We find here a noteworthy both/and pattern. In 2015, the General Convention both enacted a change to the marriage canon and accepted the trial use of new marriage liturgies for all couples and rites for blessing of same-sex relationships; and provided that such trial use be under the direction and with the permission of the bishop exercising ecclesiastical authority and welcomed the minority voice of the Communion Partners as indispensable.⁽¹⁹⁾ Similarly, the 2018 General Convention both authorized additional trial use marriage rites for all couples and blessing rites for same-sex couples in dioceses where civil marriage is not legal; and underscored the canonical authority of rectors or priests-in-charge over worship in their congregations and the ecclesiastical authority of bishops

acting as chief liturgical officers in their dioceses, including those who cannot support marriage for same-sex couples on theological grounds. In concert with this, 2018-B012 called for bishops to continue leading the church in comprehensive engagement with the trial use rites and to provide generous pastoral response to meet the needs of all members. Finally, while the work of ongoing liturgical revision was authorized, the 1979 Book of Common Prayer was memorialized, ensuring its continued use.

Springing from this context of compromise, our Task Force was charged not with trying to resolve the fundamental differences between us but with seeking to accommodate them as a necessary gift. To quote our authorizing resolution (2018-A227): given “the clear decision of General Convention that Christian marriage is a covenant open to two people of the same sex or of the opposite sex” and “General Convention’s firm commitment to make provision for all couples asking to be married in this Church to have access to authorized liturgies,” The Episcopal Church also affirms “the indispensable place that the minority who hold to this Church’s historic teaching on marriage have in our common life, whose witness our Church needs.” Holding all three points together, Resolution 2018-A227 charged our Task Force to “seek a lasting path forward for mutual flourishing” for the two sides or perspectives — the majority and the minority — on marriage, and it provided a heading for the work: “communion across difference.”

The commitments embedded in our own Task Force’s working definition of mutual flourishing, referenced earlier, center on spiritual aspects of our life and labor as Episcopalians, including the commitment to honoring the polity and authority of our church. Strengthened by God’s grace and our own resolve, we are able to grow together in love and trust, to serve side by side in The Episcopal Church, respect, listen to, and pray for one another. All of these commitments ground and orient the work of building and sustaining communion across difference and we have reflected on them in the first two sections of this report. We confess that we have not always done this well over the years and acknowledge the many ways that people on all sides of our various differences have hurt one another along the way. With a legacy of lawsuits, mutual recrimination, church division, and crisis in the Anglican Communion on our watch, reparations and reconciliation still seem to us a way off. At the same time, we are grateful for many good-faith attempts at mutual listening and learning that we pray are seeding a new spirit in our church, turned outward in hopeful conversion and restoration — truly, a Way of Love.⁽²⁰⁾

More pointedly, the second and third commitments in our working definition of mutual flourishing touch on the concrete challenge at hand, if all are to flourish in the communion of one church. How can the members, communities, and dioceses of the majority and minority experience an equal, indispensable, and unqualified place and voice within the given structures of The Episcopal Church? This is a critically important question. The present report will not and cannot provide a definitive answer, although we are grateful to offer our own perspectives and suggest some ways forward. We urge the whole church to commit itself to careful listening, study, and prayer, so that we may be equipped for the continuing work that lies ahead.

We believe that the establishment of this Task Force represents a kairos moment, given providentially by God at this time to help Episcopalians and Anglicans find a path forward together. The circumstances leading up to the passage of Resolution 2018-B012 (Marriage Rites for the Whole Church) by the 2018 General Convention, and its subsequent authorizing of this Task Force, marked a hard-won compromise that many did not imagine possible. Significant bridge-building work on the part of the proposers of 2018-B012, the Communion Partners, including those from Province IX, members of the Task Force on the Study of Marriage, the Presiding Bishop's staff, Legislative Committee 13, and countless other bishops and deputies enabled all voices to be heard and listened to, in as full a way as possible. At the conclusion of the 79th General Convention a variety of voices welcomed the widely touted compromises and looked to the present Task Force for next steps.⁽²¹⁾

If the work of the last two General Conventions set an important precedent of cooperation between majority and minority in The Episcopal Church, it also bequeathed to the present Task Force on Communion across Difference signposts toward a lasting path forward for mutual flourishing. The General Convention has demonstrated that diversity and difference, incorporating real disagreement about important matters, need not necessitate division, if a spirit of compromise is cultivated to protect the place and voice of all.

What are some further steps that The Episcopal Church might take in order to sustain difference-in-communion on the way to the flourishing of all? As before, we pose questions that provide openings for carrying forward this work, both in the present triennium and thereafter, organized around the threefold typology of communion — baptismal, denominational, ecumenical — that we introduced in section one.

Solidarity of love: Baptismal bonds

Jesus Christ called his disciples friends (John 15:15), and in his body, the Church, all who are baptized in his name are re-made as his members (Col. 1:18; Rom. 6:3-14). Each member is indispensable, including those who seem to be “weaker” or “less honorable” — whom, St. Paul says, we are called “to clothe with greater honor.” For “God has so arranged the body, giving the greater honor to the inferior member, that there may be no dissension within the body, but the members may have the same care for one another. If one member suffers, all suffer together with it; if one member is honored, all rejoice together with it” (1 Cor. 12:22-26).

These scriptural descriptions of the whole Church apply to all denominations that seek faithful conformity to the pattern of life in Christ. Can we in The Episcopal Church and Anglican Communion decide to disagree without causing dissension? Can we guard our differences without yielding to division? As is perfectly clear from our own recent struggles and from the history of the Church, this is not easy. It is not, however, impossible. If and as we are able to commit to walking together, however duly differentiated or distanced, we will be claiming our call as brothers, sisters, and siblings whom Jesus befriended and invited to join him on the way of love and loyalty “to the end” (John 13:1).

Presuming place and voice for both the majority and minority on marriage, can we commit ourselves to continual, careful listening as a demonstration of Christ-like solidarity, “always carrying in the body” the stories and experiences of one another (2 Cor. 4:10) as the precious gifts they are? Can we agree “not to neglect meeting together, as is the habit of some, but encourage one another” (Heb. 10:25), especially in person, because we profess the incarnation and resurrection of Jesus, and pray to be “become like him in his death, if somehow [we] may attain the resurrection from the dead” (Phil. 3:10-11)? And can we cultivate communion with Anglicans the world over, and with the wider body of Christ, on the way to sharing, by degrees when necessary, “the apostles’ teaching and fellowship, ... the breaking of bread and the prayers” (Acts 2:42)? All of this and more follows from our having been claimed by Christ in baptism, which sacrament is the principal building block for all forms of communion, as the beginning of the journey of discipleship in the body.

Communion across Difference: Episcopal precedents

If baptismal solidarity orients our life together as Christians in The Episcopal Church, our commitment to protecting both place and voice in the same church for the majority and minority on marriage presents a specific opportunity to practice communion across difference. As described above, our church has struggled to hold together both clear decisions reached by legislative majorities and to safeguard space for minorities who in good conscience cannot agree but wish loyally to remain both in the Episcopal Church and the Anglican Communion. This was true in the early years of the struggle for the full inclusion of LGBTQ members and it is true today for the Communion Partners. Given our recent history, the suggestion of accommodating minority views in perpetuity may seem strange. However, Episcopalians have long cherished ideals of openness and flexibility and are known among Christians for welcoming diversity.

In the first section of this report, we recalled the 1886 General Convention’s influential offering of a locally adapted episcopate to Christians of other jurisdictions, which has borne considerable ecumenical fruit.⁽²²⁾ Might the achieved compromise of the 79th General Convention signal the start of a new era in our church’s history, as a time when we began giving the gift of the Chicago Quadrilateral to ourselves to enable all to flourish? Locally adapted disagreement with respect to marriage might take various forms, ranging from simply deciding to accept diversity, as we have done recently in The Episcopal Church, to more ambitious structural reforms, of a sort that others in the Anglican Communion are attempting. There may be good reasons for both at different times, and some degree of flexibility can aid experimentation on the way to wise and peaceable settlements.⁽²³⁾ We will come to several examples in the Anglican Communion in the next subsection. For now, it bears repeating that the 2018 General Convention accepted diversity between dioceses by enabling flexibility in the oversight of parishes. Built upon the precedent of DEPO, this solution reflected, in the words of 2018-B012, our continued commitment “to honor theological diversity in regard to matters of human sexuality” (2018-B012 §13).

Here we register some of our own questions about the limits of diversity, and the sustainability of the peace that General Convention brokered in 2018. Given that we seek to be comprehensive, is it

nonetheless a bridge too far to adapt ourselves to two doctrines of marriage (or of anything else) within one church (recognizing, for instance, canonical discrepancies between diocesan and churchwide definitions of marriage)? Moreover, is differentiated oversight of some parishes from their geographic dioceses — both “majority”-identified parishes within “minority” (Communion Partner) dioceses, and vice versa — sustainable in the long, or even medium term? On both sides, clerical leaders as well as members of those parishes sometimes feel out of sorts with their dioceses, disrespected by colleagues, and alienated from their bishops. As members of our Task Force testified, such feelings have been common among both self-identified LGBTQ and conservative clergy, laity, parishes, and dioceses for at least a generation. Add to this questions about succession of leadership for all concerned — “majority”-minded clergy in “minority”-identified dioceses on the one hand; Communion Partner dioceses themselves, and “minority”-identified clergy and parishes elsewhere, on the other; and finally the wider ecclesiological question of what it means for the minority in this instance to hold the majority view of the Anglican Communion. Some say that 2018-B012’s “supplemental episcopal pastoral care” has worked well, just as the older delegated episcopal pastoral oversight (DEPO) still serves its purpose for parishes in various dioceses on both sides. Even so, one, uniform policy to accommodate all arrangements of adapted episcopal care seems requisite, if heretofore ad hoc arrangements are to find their feet as settled means of negotiating communion across difference.

On all counts, more work should be done to understand and receive the compromise of the 79th General Convention, as a step toward sustaining difference-in-communion for the flourishing of all. We recognize that other church-wide groups such as the Task Force on Women, Truth and Reconciliation, the Executive Council Committee on Anti-racism and Reconciliation, as well as the SCLM and Task Force on Liturgical and Prayer Book Revision are laboring in this and adjoining fields. We believe that attention should be given to the ecclesiological questions raised in the present report, especially to do with the exercise, role, and range of episcopal ministry, since the ministry of bishops necessarily incorporates local, regional, and worldwide aspects. In a world that seeks to overcome disagreement through enforced uniformities, differentiated communion in an episcopal key may contribute a much-needed leaven of principled diversity, set within provisional structures that model humility.⁽²⁴⁾

Walking together at a distance: Ecumenical connections

We noted above that locally adapted disagreement may take various forms, and we wish finally to touch on several other models, drawn from colleagues in the Anglican Communion, with whom we were charged to consult (2018-A227 §4). If these models tend toward more structural solutions to the challenge of communion across difference, they also share a commitment to finding ways of walking together in order to enable mutual flourishing, typically with recourse to concepts developed in ecumenical settings.

Walking together entered the contemporary lexicon of the Anglican Communion with the well-known conclusion of The Windsor Report (2004), which warned: “There remains a very real danger

that we will not choose to walk together. Should the call to ... find ways of continuing in our present communion not be heeded, then we shall have to begin to learn to walk apart” (§157). Less-often remembered is the same text’s earlier reference to walking together, which excavated the literal Greek meaning of the phrase: synodality. As the report summarized: “It is by listening to, and interacting with, voices from as many different parts of the family as possible that the Church discovers what its unity and communion really mean” (§66). The image of walking together returned at the historic 2016 Primates’ Meeting, Archbishop Welby’s first, which all the primates attended, including Presiding Bishop Curry. At meeting’s end, all professed a “unanimous desire to walk together,” even when some “distance” may seem necessary on the way to persevering in love.⁽²⁵⁾

The 2018 General Synod of the Anglican Church in Aotearoa, New Zealand, and Polynesia provides a second example of walking together at a distance on the way to resolving neuralgic conflict. In a first step, the motion on marriage accepted by synod retained the traditional formularies while allowing bishops to permit the blessing of same-sex unions within their dioceses. In turn, however, the non-geographic Diocese of Polynesia, culturally distinct from the other two ethnic groupings in that province’s “three-tikanga system,” chose to opt out of the motion’s provision for same-sex unions as not in keeping with its theological and cultural understanding of marriage. While the Anglican Church in Aotearoa, New Zealand, and Polynesia is uniquely structured in a way that can accommodate the latter decision, the Indigenous minority in the Anglican Church of Canada is now pursuing a similar structural differentiation from its province as a whole. Such developments can be painful, to be sure. At the same time, as Secretary General Josiah Idowu-Fearon noted about the resolution in Aotearoa, New Zealand, and Polynesia, it “recognized that difference without division is possible” — difference, in this case, incorporating a non-geographical diocese within the wider church.⁽²⁶⁾

A third instance of differentiated walking together may be seen in the Church of England’s “Five Guiding Principles” with respect to women’s ordination, according to which a traditionalist “society” was created within the wider church to accommodate the minority, with force of canon and without limit of time.⁽²⁷⁾ Our own Resolutions 2018-B012 and 2018-A227 resemble these principles, which in the Church of England’s case begin by marking the “clear decision” of the church about women’s ordination before proceeding to enable the “mutual flourishing” of majority and minority moving forward. The Church of England’s Faith and Order Commission, in a significant study, called the settlement “a remarkable adventure in how ecclesial communion can be sustained without agreement in belief and practice on something that has been considered to be of decisive importance for ‘full’ communion.”⁽²⁸⁾ As in New Zealand, not all have been pleased with this outcome. The new-fashioned space of structural differentiation has, however, arguably enabled the Church of England to avoid schism, through a creative application of ecumenical lessons to its internal denominational life.

All three examples of walking together at a distance may help us imagine next steps along a “lasting path forward for mutual flourishing” in The Episcopal Church, both together and as differentiated dioceses. We said above that seeking a lasting path forward suggests the path has yet to be fully found, but we differ also on the nature of the path itself, to do with how decisions should be made

about marriage. In studying this very question, the Ecclesiology Committee of the House of Bishops recently pointed up two views — a majority view that believes the General Convention capable of deciding the matter, and a minority one that believes Anglican consensus is required.⁽²⁹⁾ Here again, ecumenical ecclesiology, as a school in charity, can help relieve the felt need of being in identical places along the road, even as we remain committed to discovering the pilgrim way of discipleship and of love.⁽³⁰⁾ A commitment to mutual flourishing for all Episcopalians — and for all Anglicans, and all churches with which we share varying degrees of communion — must likewise commit itself, as we on this Task Force have done, to finding and defending place and voice for all with whom we are walking. There should be no question of walking in lock step, but only a shared hope that, Lord willing, we may continue to advance together toward Christ, and in that Way find one another as well.

Conclusion

The assignment to reflect on communion across difference suggested for this Task Force a focus on how we remain bound together in Christ and in the Church notwithstanding — even, perhaps, aided by — deep disagreement. The directional metaphor “across” brings to mind a bridge, that may be traversed when traveling from one side or part of the Church to another. Each side of the bridge, each part of the Church, has a divine purpose, and so should be respected and protected, just as the bridge enables and invites communication and sharing, by God’s grace. Stated in terms of our presenting challenge, we resolutely accept General Convention’s clear decision about marriage, its firm commitment to providing for all couples seeking to be married, and its affirmation of the indispensable place of the minority, whose witness the Church needs (2018-A227).

While the recent actions of the General Convention are clear enough, we on this Task Force, representing the majority and minority of The Episcopal Church on the subject of marriage, do not know exactly what should come next and what may be possible. We have made a theological argument for communion across difference, raised questions for continuing work, and suggested several adaptive models that may prove useful for our purposes going forward. We wish to live together peaceably in the same church without agreeing on marriage because adding to division in the body of Christ would be a failure both of witness and love. All Christians and churches are struggling with the same questions about sexuality and marriage, and the road is littered with failed attempts at listening, forbearance, transparency, and charity. We accept responsibility for some of this. At the same time, we rejoice that we have been placed together, and within a worldwide communion of Anglicans, that, by God’s providence, is called to solidarity in the Body of Christ.

May God give us the grace to uncover and defend a proper diversity and breadth in the Body, that will encourage many to persevere with joy in the work of communion across difference, “so that the world may believe” (John 17:21).

Postscript

Due to the Covid-19 pandemic, the Task Force met only once in person and seven times using Zoom technology. These challenges hampered our efforts, given the relational focus of conversations about communion. Even so, we have pressed on with courage, and rejoice in the friendships that have grown “across distance.” We are proud of the work we have accomplished and commend it to The Episcopal Church and to our colleagues in the Communion, with genuine faith, hope, and love.

End Notes

- (1) Adopted by the Task Force on Communion Across Difference, St. Louis, March 19-21, 2019.
- (2) See “General Thanksgiving,” BCP, p. 101.
- (3) Presiding Bishop Curry speaking on racial reconciliation, available online: <https://episcopalchurch.org/racial-reconciliation>
- (4) For three classic texts in the development of what we today call communion ecclesiology, see the Chicago-Lambeth Quadrilateral (1886, 1888); World Council of Churches, Baptism, Eucharist and Ministry (1982); Anglican-Roman Catholic International Commission, Church as Communion (1990).
- (5) BCP, pp. 876-77. Since the report was written as a “solemn declaration” of “bishops assembled in council,” the House of Deputies needed only to respond, which it did with its own resolution on the 18th day, to wit: “The House of Bishops concurring, that a Commission consisting of five Bishops, five Clerical and five Lay Deputies, be appointed to open communications with the various Bodies of Christians in this land, with a view to ascertaining, from a duly authorized representation of said Bodies, if a disposition exist among them to promote organic unity upon the basis of ‘The Apostles’ Doctrine and Fellowship and in the Breaking of the Bread and the Prayers;’ and further, in the event this disposition does exist, to inquire what benefits they think we can mutually impart to one another, and what advantages in their opinion would result in furtherance of the evangelization of the world; and that this Commission be requested to make a report of its action to the General Convention of 1889.” The next day, the House of Bishops concurred with several amendments. See Journal of the Proceedings of the Bishops, Clergy, and Laity of the Protestant Episcopal Church in the United States of America, Assembled in a General Convention, Held in the City of Chicago, from October 6 to October 28, Inclusive, in the Year of Our Lord 1886 (1887), pp. ix, 10, 16, 21, 35, 40, 79-80, 135, 138, 145, 146, and Appendix XXII, pp. 840-44; available online: <https://www.episcopalarchives.org/governance-documents/journals-of-gc>
- (6) Toronto Anglican Congress (1963), available online: http://anglicanhistory.org/canada/toronto_mutual1963.html Cf. the consequent “Special Program” of General Convention 1967 and the “Venture in Mission” of General Convention 1976.
- (7) See further the work of Dr. Donna Hicks on conflict resolution and the essential elements of dignity in the Supplemental Materials section of this report.
- (8) Included with his sermon preached at the House of Bishops virtual meeting on September 16, 2020 entitled “What Did Jesus Do?”; available online: <https://episcopalchurch.org/posts/publicaffairs/presiding-bishop-currys-word-church-what-did-jesus-do>

(9) A press release from the Diocese of Long Island accompanying the filing of B012 recounted the pre-Convention conversations: “The minority of ‘Communion Partner’ bishops in our church have felt unable as a matter of conscience to permit congregations under their care to practice same-sex marriage, for theological and ecclesiological reasons. They have told us that [the proposed solution of alternative oversight] allows them to maintain their conscientious position, and Communion Partner clergy have told us that it is important for there to be at least some dioceses in The Episcopal Church that both teach and practice marriage alongside the majority of the Anglican Communion. This proposal allows conservatives to flourish within the structures of The Episcopal Church, but not at the expense of progressive congregations in conservative dioceses. While at first glance it may sound unnecessarily complex, it is a ‘middle way’ that makes room for all in one church.” The Communion Partner bishops, in turn, “pledged in writing to implement [B012] in their dioceses, if it is passed.” Documents available online: <https://www.dioceseli.org/media/diocesan-news/marriageforthewholechurch/> and: https://communionpartners.org/the-vocation-of-anglican-communion/#_ftnref5

(10) Resources on Continuing Indaba may be found on the Anglican Communion’s website: <https://www.anglicancommunion.org/mission/reconciliation/continuing-indaba.aspx>

(11) Jan. 13-14, 2020. Additional sponsors of this event were the dioceses of Texas and Dallas, and the Living Church Institute. Papers are in process of publication.

(12) Mark Michael, “Seeking Communion in the Midst of Disagreement,” available online: <https://livingchurch.org/2020/01/20/seeking-communion-in-the-midst-of-disagreement/>

(13) https://episcopalarchives.org/cgi-bin/acts/acts_resolution-complete.pl?resolution=2015-A036

(14) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2015-A054

(15) <https://extranet.generalconvention.org/staff/files/download/21189>

(16) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2018-B012

(17) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution.pl?resolution=2018-A227

(18) https://www.episcopalarchives.org/cgi-bin/acts/acts_resolution-complete.pl?resolution=2018-A068

(19) From the Communion Partners Website: <https://communionpartners.org/about-communion-partners/>

(20) “The Way of Love: Practices for a Jesus-Centered Life,” available online: <https://episcopalchurch.org/way-of-love>

(21) Episcopal News Service, “Convention lets its ‘yes’ be ‘yes,’ agreeing to give church full access to trial-use marriage rites,” July 13, 2018, available online: <https://www.episcopalnewsservice.org/2018/07/13/convention-lets-its-yes-be-yes-agreeing-to-give-church-full-access-to-trial-use-marriage-rites/> Communion Partners, “Austin Statement,” July 13, 2018, available online: <https://communionpartners.org/austin-statement-july-13-2018/> The Rev. Susan Russell, “Episcopal Church Says ‘We Do’ to Marriage Rites for the Whole Church,” available online: <https://inchatatime.blogspot.com/2018/07/episcopal-church-says-we-do-to-marriage.html>

(22) See especially the multilateral landmark Baptism, Eucharist and Ministry (1982), which embraced a broadened episcopé, retrieved from the New Testament, as a way of imagining a larger pattern of oversight than that simply associated with “bishops” in the traditional sense; available online: <https://www.oikoumene.org/en/resources/documents/commissions/faith-and-order/i-unity-the-church-and-its-mission/baptism-eucharist-and-ministry-faith-and-order-paper-no-111-the-lima-text>

(23) Cf. the 2009 statement of the Evangelical Lutheran Church in America (with which The Episcopal Church is in full communion), *Human Sexuality: Gift and Trust*; available online: <https://download.elca.org/ELCA Resource Repository/SexualitySS.pdf> The ELCA recognized four positions of “bound conscience” on same-sex sexuality within their church. Rather than adjudicating between them, the ELCA called for “mutual respect in relationships” and for life together in disagreement, by which they would “accompany one another in study, prayer, discernment, pastoral care, and mutual respect.” Since the ELCA lacks a prayer book that functions as a doctrinal standard, they simply published supplemental liturgies that are now used for same-sex marriages without modification to their standard books of worship.

(24) For the suggestion that The Episcopal Church accepts a principled diversity with respect to marriage and sexuality, see the Anglican-Roman Catholic Theological Consultation in the U.S.A., *Ecclesiology and Moral Discernment: Seeking a Unified Moral Witness* (2014), §64; cf. §§51, 56. Available online: <https://iarccum.org/archive/USA/ARC-USA-2014.pdf>

(25) Primates’ Meeting communiqué, “Walking Together in the Service of God in the World” (Jan. 15, 2016); available online: <https://www.anglicannews.org/features/2016/01/communique-from-the-primates-meeting-2016.aspx> Cf. Gavin Drake, “Presiding Bishop Michael Curry speaks on Primates’ statement,” ACNS (Feb. 15, 2016).

(26) Anglican Communion News Service, “Anglican Church in New Zealand opens the door to blessing same-sex relationships,” available online: <https://www.anglicannews.org/news/2018/05/anglican-church-in-new-zealand-opens-the-door-to-blessing-same-sex-relationships.aspx>

(27) Church of England The Five Guiding Principles, available online: https://www.churchofengland.org/sites/default/files/2018-02/5_Guiding_Principles.pdf

(28) General Synod, *Communion and Disagreement: A Report from the Faith and Order Commission* (2016), §68; available online: https://www.churchofengland.org/sites/default/files/2017-10/communion_and_disagreement_faoc_report_gs_misc_1139.pdf

(29) Ecclesiology Committee of the House of Bishops, *Re-membering and Re-Imagining: Essays on the Episcopal Church*, published as an issue of *Sewanee Theological Review*, 61/2 (2018); available online: https://www.episcopalchurch.org/wp-content/uploads/sites/2/2021/02/str_ecclesiology_report_2018.pdf The recent consultation at Virginia Theological Seminary, “When Churches in Communion Disagree,” Jan. 13-14, 2020, carried this work forward. See commentary from Jean Cotting, available online: <https://www.vts.edu/anglican-commentary-detail?pk=1306135>

(30) See, for instance, the argument for ecumenical synodality by the Anglican-Roman Catholic International Commission in its latest text, appropriately titled *Walking Together on the Way: Learning to be the Church—Local, Regional, Universal* (2018). Cf. Communion Partners, “The Way of Anglican Communion” (2018), available online: <https://communionpartners.org/the-way-of-anglican-communion-walking-together-before-god/>

Proposed resolutions

A056 Communion Across Difference

Resolved, the House of ____ concurring, That the 80th General Convention directs the Presiding Bishop and President of the House of Deputies to appoint a second Task Force on Communion Across Difference to continue the work started but limited by the COVID-19 pandemic, consisting of not more than 12 people, who represent the cultural, generational, racial, ethnic and theological diversity in the Church, including especially members from dioceses outside the United States; and be it further

Resolved, That half of the members appointed hold that marriage is a “covenant between a man and a woman” (BCP, 422), half hold that marriage is a “covenant between two people” in the presence of God (Resolution 2018-A085), and that all of those appointed seek a pathway toward mutual flourishing in The Episcopal Church; and be it further

Resolved, That the Task Force will seek to build on the Blue Book report of the previous triennium, continuing to seek a lasting path forward for mutual flourishing consistent with this Church’s polity and the 2015 “Communion across Difference” statement of the House of Bishops, affirming (1) the clear decision of General Convention that Christian marriage is a covenant open to two people of the same sex or of the opposite sex, (2) General Convention’s firm commitment to make provision for all couples asking to be married in this Church to have access to authorized liturgies; and also affirming (3) the indispensable place that the minority who hold to this Church’s historic teaching on marriage have in our common life, whose witness our Church needs; and be it further

Resolved, That the Task Force develop and publicize further tools for engaging the members of this Church in the substance of the Task Force on Communion Across Difference Blue Book Report to this Convention, including but not limited to videos documenting experiences across this Church that demonstrate positive examples of communion across difference, and materials that broaden the conversation beyond matters of human sexuality and marriage; and be it further

Resolved, That the Task Force consult widely with members of this Church who represent its diversity of cultural background, age, race, gender, gender identity, and sexual orientation, particularly its members in countries other than the United States; and also with representatives from the Anglican Communion, our full-communication ecumenical partners, and those churches with whom we carry on ecumenical dialogues; and be it further

Resolved, That the 80th General Convention commends to dioceses, parishes, and churchwide staff the Conversation Tool created by the Task Force on Communion Across Difference included in the Supplemental Materials section of their Blue Book report to this Convention; and be it further

Resolved, That the Task Force report and make recommendations to the 81th General Convention, ending its term at that time except by further action of General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$75,000 for the implementation of this resolution.

EXPLANATION

The 79th General Convention directed the Presiding Bishop and the President of the House of Deputies to appoint jointly a Task Force on Communion across Difference, consisting of not more than 14 people, who represented the diversity in this Church including members from countries other than the United States, half of whom held that marriage is a “covenant between a man and a woman” (BCP, 422), half of whom held that marriage is a “covenant between two people” (Resolution 2018-A085), in the presence of God, and all of whom sought a pathway toward mutual flourishing in The Episcopal Church. Our Task Force reported and made recommendations to the 80th General Convention, and our enabling resolution specified that our Task Force would continue only at the request of the next General Convention.

The Task Force did its best despite the limitations imposed by the Covid-19 epidemic to accomplish this work, the fruit of which is contained in its Blue Book Report to this Convention. Of particular note is the working definition of “mutual flourishing” developed by the Task Force and a “conversation tool” to assist members of this Church in engaging that definition and the conversation more broadly. The Task Force also articulated a helpful theological framework for engaging communion across difference, recognizing the many challenges and tensions present in that work. While we believe we have done significant theological and relational work on what it means to walk together as disciples of Jesus on the Way of Love, we have only begun a process that cries out for further exploration. We believe that reconciliation and “mutual flourishing” should continue to be our goal, by God’s grace, but that the truth-telling, transformation, and relationship building that are necessary on the way to that goal do not come quickly or easily.

Members of the current Task Force believe that building the kind of relationships needed to take this work further were severely hampered by the Covid-19 pandemic and our inability to meet face to face. We propose that to do this work well, funding for at least two face-to-face gatherings over the next triennium will be necessary, and ideally three. Our suggestion to appoint not more than 12 members is meant to make multiple face-to-face meetings financially possible, but a larger membership with a larger budget would also be welcome.

Supplemental Materials

1. Task Force Conversation Exercise

- English: <https://tinyurl.com/CAD-english>
- Spanish: <https://tinyurl.com/CAD-espanol>

2. Resources for Conversation commended by the Presiding Bishop

- “Make Me an Instrument of Peace: A Guide to Civil Discourse,” online curriculum from the Office of Government Relations <https://www.churchnext.tv/library/make-me-an-instrument-for-groups/109669/about/>
- “Learn, Pray, Act: Resources for Responding to Racist Violence,” curated by Episcopal Church staff for Racial Reconciliation and Justice and the Office of Government Relations <https://www.episcopalchurch.org/responding-to-racist-violence/>
- From the Center for Racial Healing and the Diocese of Atlanta <https://www.centerforracialhealing.org/>
- “With Malice Toward None,” a program designed for churches and groups to provide a way for understanding and healing for all sides of our political divisions for both before and after the November election <https://braverangels.org/what-we-do/with-malice-toward-none/>

3. Dignity Resources from Dr. Donna Hicks

- <https://drdonnahicks.com/>
- “Ten Essential Elements of Dignity” and “Ten Temptations to Violate Dignity” <https://tinyurl.com/CAD-DonnaHicks-Dignity>
- Dignity Declaration: <https://declaredignity.com/>

Communion Partners

“Communion Partners is an episcopally led fellowship of individuals in the provinces of the Anglican Communion devoted to promoting deeper communion in the faith of the one holy catholic and apostolic Church. With evangelical fervor, we pursue and support the proclamation of the good news of Jesus Christ in word and deed. In a spirit of mutual love, we commit ourselves to honoring the authority and boundaries of our local churches, working in concert with them to pursue that unity for which our Savior prayed: “That they all may be one ... so that the world might believe” (John 17:12).

Our Mission

As Communion Partners, we seek to act within the context of a shared commitment to prayer and to regular meetings for the purposes of learning, fellowship, encouragement, and common action. We actively encourage the historic bonds of affection across the Anglican Communion, as well as new networks and links between dioceses, parishes, and individuals. We also provide pastoral and theological resources for the churches of the Communion by supporting study and teaching.

Membership is open to all clergy and lay people who are prepared to endorse and uphold the traditional teaching of our several Books of Common Prayer and the principles of The Windsor Report and The Anglican Communion Covenant. Based primarily in the Anglican Church of Canada and the Episcopal Church (spanning the United States, the Caribbean, and Latin America), we seek to maintain a visible link to the whole Anglican Communion on the way to resolving important questions of faith and order.

We are committed to transparent communication with all of our colleagues, including the primates of our churches and the Archbishop of Canterbury as a focus of unity (Covenant 3.1.4), and to patient participation in the councils of the Communion.”

For some members of the task force it is important to clarify that this fellowship is not and should not be interpreted to be the only way Episcopalians are in partnership with our wider Anglican Communion siblings, including but certainly not limited to the stellar work of Episcopal Relief and Development (ERD)."

For other members on the task force who self-identify as Communion Partners, it is important to clarify that the use of the term Communion Partners is not intended to imply that other Anglicans who do not maintain those requests do not also understand themselves as faithful members of the Anglican Communion.

TASK FORCE ON DIALOGUE WITH SOUTH SUDANESE ANGLICAN DIASPORA

Membership

The Rev. Ranjit Mathews, <i>Chair</i>	Connecticut, I	2021
The Rt. Rev. Alan Scarfe, <i>Vice-Chair</i>	Iowa, VI	2021
Mr. Buck Blanchard	Colorado, VI	2021
The Rt. Rev. Martin Field	West Missouri, VII	2021
Ms. Jackie Kraus	Chicago, V	2021
The Rev. Michael Paul	North Dakota, VI	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

Mr. Russell Randle left in 2019. Mr. Buck Blanchard replaced him.

Acknowledgements

The Rev. Canon Ronald C. Byrd, Sr., Office of Black Ministries

Mandate

2018-Do88 Dialogue with South Sudanese Anglican Diaspora

Resolved, That the 79th General Convention call upon the Presiding Bishop to appoint a task force of two bishops, two clergy, and two lay persons to establish an official conversation for the purpose of developing a statement of understanding of the relationship with the South Sudanese American Anglican diaspora living in this country and The Episcopal Church; and be it further

Resolved, That this task force report to the Executive Council at least once each year during the coming triennium; and be it further

Resolved, That this task force conclude its work and expire no later than adjournment sine die of the 80th General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$15,000.00 for the implementation of this resolution.

Summary of Work

During an initial virtual meeting in November 2018, it was agreed to pursue discussions on a regional or provincial basis, given the logistical and budget obstacles to conducting gatherings of the diaspora community. It was decided to schedule an in-person meeting to begin the work of the Task Force. It was held January 28-29, 2019, at Maritime Center, Linthicum Hts., MD. A total of 22 virtual monthly meetings were held between February 2019 and November 2020.

A first step agreed upon by the Task Force was a survey conducted by Bishops Field and Scarfe at the March HOB meeting to identify S. Sudanese communities, congregations and leaders in their dioceses, resulting in 90 responses. Task force members were to do likewise. Twenty-seven South Sudanese communities were identified. The objective was to prepare and arrange for one-day regional/provincial discussions with the South Sudanese Anglican Diaspora (SSAD) at appropriate locations around the continental U.S. It was agreed that consultations should occur with key SSAD leaders as to their expectations for such consultations and how they should occur. The objective is to seek to arrive at a mutually workable path forward towards engagement, mutual learning and mutual spiritual enrichment between the SSAD community and TEC, recognizing the gifts each community brings to these conversations.

The Rev. Canon Ron Byrd offered financial support and expertise from the Office of Black Ministries. The Task Force applied for a \$52,000 grant from the Constable Fund to bring the SSAD community together for five conferences in 2020 in different regions of the U.S. The grant was approved. A Steering Committee was formed to plan an initial conference April 30-May 2, 2020 in Kansas City, MO. Bishop Field agreed to liaise with the Steering Committee for the Task Force. The Task Force recruited the Rev. Stan Runnels and the Rev. Moses Thon Chol to co-chair the Steering Committee. A virtual meeting was held January 13, 2020. Members are the Rev. Moses Thon Chol, the Rev. Zachariah Char, the Rev. John Deng, the Rev. Stan Runnels, and the Rev. Dr. Rich Jones. The Task Force asked the Steering Committee to frame their work around a “Statement of Purposes and Desired Outcomes”, consisting of seven purposes, as follows:

1. Identify SSAD Anglican/Episcopal clergy in the U.S & build a database.
2. Invite SSAD clergy to engage with TEC in a more integrated way.
3. Begin to identify a path and process to “regularize” in TEC the ordinations and standing of SSAD clergy, and to form educational pathways for additional professional education of SSAD clergy.
4. Identify worshipping communities of SSAD people and build a database of locations, leaders (lay and clergy), and investigate how they integrate with TEC churches.
5. By listening and dialogue, identify the obstacles to achieving Purposes 3 & 4.
6. Establish a path by which this dialogue can be continued and enriched during the triennium.
7. Assist the TEC-SSAD Task Force to formulate recommendations to the next General Convention.

Due to the COVID-19 pandemic, discussion turned toward alternative dates for this Conference and the Task Force began working with a date in September. At the virtual meeting of the Task Force, May 27, 2020, it was announced that non-essential travel was canceled by TEC, indefinitely, thus canceling plans for the SSAD Clergy Conference, sponsored by The Episcopal Church’s South Sudanese Diaspora Task Force, indefinitely.

The \$52,000.00 Constable Fund grant still applies. The Task Force was not able to hold the necessary conversations with the SSAD, thus undermining the Task Force’s ability to carry out this mandate. Even though in-person meetings have not been possible, and the planned conference has had to be delayed, the Task Force has remained active. The Task Force, with the assistance and leadership of the Steering Committee, has identified SSAD leaders and had conversations with them concerning how best to proceed under the circumstances.

The Task Force is currently planning virtual conferences and compiling dates to move forward. The Steering Committee is now tasked with setting dates for four Zoom conference “listening sessions”. Each will include 12 attendees – two Task Force members, nine or ten South Sudanese Anglican Diaspora (men and women), plus a facilitator. Those conversations are anticipated to help develop meaningful topics of conversation for the in-person conference, whenever it is safe to hold that gathering.

The Task Force believes the work remains essential and requests the Task Force be continued for the next triennium to pursue its vital work.

Proposed resolutions

A004 Continue Task Force on Dialogue with South Sudanese Anglican Diaspora

Resolved, the House of ____ concurring, That the 80th General Convention extend the work of the Task Force on Dialogue with South Sudanese Anglican Diaspora for the coming triennium; and be it further

Resolved, That the task force report to the Executive Council at least once each year during the coming triennium; and be it further

Resolved, That the task force conclude its work and expire no later than adjournment sine die of the 81st General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$25,000 for the implementation of this resolution.

EXPLANATION

The 79th General Convention of The Episcopal Church approved Resolution 2018-Do88 which called upon the Presiding Bishop to appoint a task force named the Task Force on Dialogue with South Sudanese Anglican Diaspora (Task Force) and consisting of two bishops, two clergy, and two laypersons. The Task Force was tasked with establishing an official conversation with the South Sudanese-American Anglican Diaspora (SSAAD) living in the United States and to develop a statement of understanding regarding the relationship of SSAAD communities and members and The Episcopal Church (TEC).

The Task Force was duly formed and met once in person and on numerous occasions virtually during the triennium. To carry out its mandate, the Task Force intended to host an in-person conference in the spring of 2020 to bring together leaders of SSAAD communities and members of the Task Force. The purpose of the conference was:

1. to discuss the substance of 2018-Do88;
2. to examine the relationship of SSAAD members and communities with TEC as well as its dioceses and local churches; and
3. to ascertain the steps and actions needed more fully and appropriately to incorporate local SSAAD communities into the fabric of TEC.

Unfortunately, shortly before the in-person conference was to convene, the world-wide COVID-19 pandemic interrupted all in-person meetings. Therefore, the Task Force was not able to hold the necessary conversations with the SSAAD, thus undermining the Task Force's ability to carry out its mandate.

Even though in-person meetings have not been possible, and the planned conference has had to be delayed, the Task Force has remained active. The Task Force has held regular meetings by Zoom, typically once per month. The Task Force has liaised with the Rev. Canon Ron Byrd and the Office of Black Ministries. The Task Force, with the assistance and leadership of a Steering Committee (formed to help with the logistics and planning of the in-person conference), has identified South Sudanese Anglican Diaspora leaders and had conversations with them concerning how best to proceed under the circumstances. The Task Force is currently planning for virtual conferences and compiling potential dates to move forward. The Steering Committee is now tasked with setting dates for four to six Zoom conference "listening sessions." Each will include 12 attendees – two task force members, nine or 10 members of the South Sudanese Diaspora (men and women), plus a facilitator. The Steering Committee will guide the conversations. Those conversations are anticipated to help develop meaningful topics of conversation for the in-person conference, whenever it is safe to hold that gathering.

The Task Force believes the work remains essential and requests the Task Force be continued for the next triennium to pursue its vital work.

Continuance recommendation

We request that the House of Deputies in consultation with the GCO, allow this Task Force to continue our mandated work past the next General Convention (80) and into the next triennium.

TASK FORCE ON DISABILITY & DEAF ACCESS

Membership

The Rev. Twila Smith, <i>Chair</i>	Western New York, II	2021
Ms. Sarah Watkins, <i>Vice-Chair</i>	Texas, VII	2021
The Rev. Dr. Eugene (Gene) Bourquin	New York, II	2021
Ms. Carrie Brown	Maryland, III	2021
The Rev. Suzanne Johnston	Rochester, II	2021
Ms. Cass Martensen	San Diego, VIII	2021
Mr. Gary Moore	Central Gulf Coast, IV	2021
The Rt. Rev. Mark Van Koevering	Lexington, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rt. Rev. Rob Skirving, East Carolina (2019); no replacement

Mandate

2018-D097 Establish an Advisory Council on Disability and Deaf Access

Resolved, That the 79th General Convention reaffirm and renew its previous commitments to Resolutions 2003-D051 and 2015-D043, which require the Church to provide persons with disabilities and Deaf people with full independent accessibility to all official and ancillary events of the Church, including worship; and be it further

Resolved, That the 79th General Convention establish a Task Force to review progress made toward full compliance with the Americans with Disabilities Act (ADA) and any other relevant statutes; consult with Church staff to ensure that materials, policies, and procedures for accessibility and reasonable accommodations are developed and implemented for each General Convention and ancillary Church events; and develop a means of reconciliation with people who have been excluded from Church events due to lack of accessibility or failure to provide reasonable accommodations; and be it further

Resolved, That the Task Force shall consist of between five and nine members, to be appointed jointly by the President of the House of Deputies and the Presiding Bishop, and a majority of the members shall be people with disabilities and deaf people, and be it further

Resolved, That the Task Force include such progress in their report to the 80th General Convention on their work.

Summary of Work

Task Force Composition and Perspective

The Task Force on Disability and Deaf Access includes members who are Deaf and hard of hearing, have physical disabilities, vision loss, and mental health disabilities, and a parent of a person with neurological disabilities and autism. We recognize that our membership is not fully inclusive of all experiences and perspectives.

Early on, as we considered which perspectives we were missing, we were intentional in thinking as broadly as possible about the issues under our charge and the people they impact, while recognizing that our work and this report may fall short of this goal, particularly as it relates to barriers and discrimination faced by autistic people, Deafblind people, persons with intellectual and developmental disabilities, and people who experience discrimination at the intersection of disability/Deaf and other marginalized identities.

In undertaking our charge, we focused primarily on the impacts of ableism and audism on Deaf/deaf and hard of hearing people and people with disabilities, in their experiences of Church, and did not extensively cover the impacts on family members and loved ones.

Terminology

This report highlights how people with disabilities and people who are Deaf/deaf and hard of hearing continue to experience prejudice, discrimination, and barriers to full inclusion in the life and ministries of The Episcopal Church. The Task Force recognizes that readers of this report have varying degrees of familiarity with issues surrounding disability and hearing differences, and as such, as it is important to define terminology we have used on our Task Force and in this report. We also believe that understanding this terminology is important for the work of the Church. We acknowledge that we have primarily approached this language and these issues from the perspective of people with disabilities and Deaf/deaf and hard of hearing people in the United States, and that appropriate or accepted terms may differ from country to country, as well as by language.

“Person First” and “Identity First” Language

Both people with disabilities and Deaf/deaf and hard of hearing people have experienced a long history of exclusion and segregation and have been “labeled” and “othered” by the medical profession, the church, and society at large. Seeking to redefine themselves, for themselves, both Deaf/deaf and hard of hearing people and people with disabilities have developed preferred terms and language to label themselves and build positive identities. Language and terminology that is considered acceptable to people with disabilities and Deaf/deaf and hard of hearing people is constantly evolving and opinions on what words to use and who can use them are, like the Deaf/deaf

and disability communities themselves, extremely diverse. Many people with disabilities, having had their personhood diminished by medical labels and offensive slurs that they did not choose for themselves, believe it is important to be seen as a person, first, and then as someone with a disability. Person-first language acknowledges that people with disabilities are people, first. People who use person-first language may have disabilities and those disabilities may be an important part of who they are, but they are not defined by them. Person-first language is especially common among people with intellectual and developmental disabilities. In most cases, person-first language is acceptable for people who do not have disabilities to use when referring to people who do.

Still other people with disabilities and Deaf/deaf and hard of hearing people have developed political, social, and cultural identities and a sense of “disability pride” or “Deaf pride” that is inextricably bound up with who they are as individuals. For these people, being Deaf or disabled is an integral part of their identities, and they may choose to use identity-first language rather than person-first language. The use of identity-first language is especially common among Deaf, blind, and autistic people, but is used by people with all types of disabilities.

In this report, we have largely used person-first language, recognizing that this is an established and accepted practice when writing about disability, especially in the United States. We acknowledge that it can be complex to understand when it is appropriate to use identity-first or person-first language and, for this reason, we encourage that all people seeking to navigate these issues:

- Uplift and use language that recognizes the personhood and diverse humanity of people with disabilities and Deaf/deaf and hard of hearing people
- Avoid the use of slurs and offensive language, as well as metaphors that equate disability and hearing differences with sin, failing, or negativity, and;
- Honor individual and community preferences for identity-first or person-first language.

Use of the terms “ableism” and “audism”

Throughout this report, we use the terms “ableism” and “audism” to refer to prejudice and systemic discrimination against people with disabilities and Deaf/deaf and hard of hearing people, respectively. The terms ableism and audism were coined in the late 1970s by disability/Deaf activists and scholars and have become more widely used in recent years. The effects of audism and ableism are most deeply experienced by Deaf/deaf and hard of hearing people and people with disabilities, but as with racism, sexism and other forms of systemic discrimination, they also have pervasive negative impacts on other individuals, and indeed on the Church and society as a whole.

Use of the term “disability”

As part of our charge relates to an evaluation of The Episcopal Church’s compliance with Americans with Disabilities Act (ADA), we have chosen to define “disability” in similar terms to the definition

provided by the ADA. For our purposes, a disability is an “impairment that substantially limits one or more major life activities.” The ADA also recognizes that people who have a history of a disabling impairment or are perceived by others to have an impairment, are also people with disabilities. This definition resonated with our goal to interpret our charge in the broadest terms possible.

The ADA does not provide a list of qualifying disabilities, and neither do we want to be in a position to determine who has a disability and who does not. That said, we acknowledge that disabilities can include physical, intellectual, developmental, mental health, chronic illness and other conditions. We also acknowledge that not everyone with a disability has or is able to access a clear medical diagnosis and that diagnosis should not be the only criteria by which disability, or the need for accommodations, is determined.

Use of the term “Deaf/deaf and hard of hearing”

The distinction between the terms “Deaf” and “deaf and hard of hearing” is important to our work and recommendations as a Task Force and to the work of the Church. Deaf (with a capital “D”) refers to people whose complete or partial inability to hear is not just a physical difference, but also a sign of identification with a distinct Deaf community and culture. People who are Deaf are often native users of American Sign Language (ASL) or other signed languages, and primarily or exclusively use sign to communicate. For Deaf people, the use of ASL or another signed language is not just a method of communication, but a critical part of Deaf identity, community, and culture.

When written with a lowercase “d,” “deaf and hard of hearing” refers to people whose complete or partial inability to hear is an audiological condition. People who are deaf and hard of hearing primarily use or prefer English or other spoken languages for communication and may have limited or no proficiency in signed languages. Also, deaf and hard of hearing people generally do not identify with Deaf culture or participate in Deaf community.

It is also important to note that spoken and signed languages are completely different from one another in terms of grammar, structure, and vocabulary. Just because someone is fluent in a spoken language does not mean that they are fluent in a signed language and vice versa. There are also diverse and distinct signed languages. American Sign Language is used primarily by Deaf people in the United States and Canada, and there are many other signed languages used by Deaf people across The Episcopal Church and the Anglican Communion.

The term “deaf and hard of hearing” also includes people who are Deafblind, which encompasses a significant number of individuals with both hearing differences and vision loss. People who are Deafblind often use tactile (hand-in-hand) sign language or low vision signing to receive communication.

For more information on this topic, go to the National Association of the Deaf website, nad.org.

Why a Distinction Between Disability and Deaf?

In the United States and other countries where The Episcopal Church is present, there is a growing body of law that recognizes, defines, and protects the human and civil rights of people with disabilities and Deaf/deaf and hard of hearing people. Rather than creating distinct legal protections for Deaf/deaf and hard of hearing people and people with disabilities, the authors of many such civil and human rights laws have chosen to define “disability” as a broad category which includes Deaf/deaf and hard of hearing people, granting rights and protections to all who experience the discrimination and structural inequalities of ableism or audism.

However, as the Task Force, we recognize that legal definitions of disability do not reflect the identities of people in the Deaf community. For Deaf people (with a capital D), the inability to hear is not a disability, but a difference, and the use of American Sign Language (ASL) or other signed languages is an important part of Deaf culture.

As such, we highlight the difference between Deaf and disability, making a distinction between the two in our Task Force name, while acknowledging that Deaf people and people with disabilities experience similar barriers to full inclusion in the life of The Episcopal Church.

Full Inclusion: A Gain for the Church

A commitment to dismantling ableism and audism and promoting full inclusion in the life and leadership of The Episcopal Church requires that we orient ourselves away from the notion that disability and hearing differences are exclusively, or even primarily, a human deficit to be overcome. The Task Force recognizes the blessings and gains that people with disabilities and Deaf/deaf and hard of hearing people bring to the Church, not despite, but because of their disabilities and hearing differences, and calls on The Episcopal Church to take proactive steps to do the same.

For example, American Sign Language not only expresses, but literally embodies the scripture narratives and liturgies, making them visible and tangible in ways that written and spoken language cannot. These gifts should not only be made apparent by means of accessibility, but also honored with deep listening and watching by the Church. Equipping Deaf people for lay and ordained ministry in American Sign Language and other signed languages strengthens not just Deaf congregations, but the whole Church.

Deaf people and people with all types of disabilities have lived experiences that offer unique perspectives on scriptural interpretation and how we as Christians understand and relate to the life of Jesus Christ – all of which add immeasurably to the richness of our faith and traditions. The gifts that Deaf/deaf and hard of hearing people and people with disabilities have for The Episcopal Church will remain unrealized as long as we continue to place barriers to ministry and dismiss possibilities out of concerns for expense or difficulty, or fail to reimagine existing systems and ministries to fit the gifts, talents, and perspectives that Deaf/deaf and disabled people bring.

Analysis of Compliance with the Americans with Disabilities Act (ADA)

The Americans with Disabilities Act (ADA) was first enacted in 1990 and the current text reflects amendments, most recently in 2008. The ADA appears in the United States Code, with the original law codified in 42 U.S.C. § 12101. The findings of Congress, found in Section 12101 and presented in part below, serve as an overview of the intent for Equal Opportunity for Individuals with Disabilities. (See ada.gov for details.)

Brief analysis of the Church's compliance, regarding participation, ministry, leadership, formation, and employment, are offered below. It is important to note that while entities of the Church are largely exempt from ADA requirements, as a Task Force we consider our baptismal covenant and the message of the Gospel. We also recognize that the language of the ADA is largely about access and, in our view, this is a limiting perspective. As noted previously, there is much for the Episcopal Church to gain from the full inclusion and gifts of persons with disabilities and Deaf/deaf and hard of hearing people.

The first portion of each item below, in italic text, references language from the ADA. We recognize that some language in the ADA is now considered dated.

“Physical or mental disabilities in no way diminish a person’s right to fully participate in all aspects of society, yet many people with physical or mental disabilities have been precluded from doing so because of discrimination; others who have a record of a disability or are regarded as having a disability also have been subjected to discrimination ...”

We affirm that Deaf persons and people with disabilities are full members of Beloved Community and should have full access to participation in the life of The Episcopal Church and its ministries. We also recognize that many still face challenges and barriers to be seen as capable of serving with the fullness of their God-given gifts and abilities. We are aware that many of our church buildings, educational institutions, camps, and conference centers continue to present barriers to physical, cultural, and programmatic access. We know that attitudinal barriers and systems of The Episcopal Church perpetuate ableism and audism, which continue to keep people away from experiences of worship, formation, leadership, and church community. We grieve that people continue to face discrimination because they have disabilities and/or are Deaf/deaf and hard of hearing. We know that we cannot fully be Beloved Community when any among us face barriers to inclusion.

“Historically, society has tended to isolate and segregate individuals with disabilities, and, despite some improvements, such forms of discrimination against individuals with disabilities continue to be a serious and pervasive social problem ...”

Physically, persons with disabilities are all too often isolated or segregated to the margins – literally – of church spaces. Many of our buildings, often historic, are still not physically accessible; in some, persons may come inside, yet not be able to reach spaces for communion, classes, and fellowship. Persons with intellectual and developmental disabilities still experience exclusion from church

gatherings, worship, and formation. Deaf/deaf and hard of hearing people are marginalized through lack of linguistic and cultural access to the Word of God, the liturgies of the church, and in fellowship, formation, and pastoral care.

“Discrimination against individuals with disabilities persists in such critical areas as employment, housing, public accommodations, education, transportation, communication, recreation, institutionalization, health services, voting, and access to public services ...”

In the Church, it is vital that we consider how we engage persons with disabilities and the Deaf/deaf and hard of hearing through employment, lay and clergy leadership, education, and communications. Do we understand where we are underrepresented? Where we remain inaccessible? Do we know the transportation barriers that keep members away from church meetings, and recognize those who have been unable to fully access and participate in our schools, camps, and conference centers? Despite our intentions of full inclusion, are we aware that micro-aggressions and discrimination persist? Are we committed to change?

“Unlike individuals who have experienced discrimination on the basis of race, color, sex, national origin, religion, or age, individuals who have experienced discrimination on the basis of disability have often had no legal recourse to redress such discrimination ...”

When anyone faces discrimination, it hurts all of us. We recognize that discrimination persists in the church and especially grieve the history of injustices toward persons on the basis of race and color. We also recognize that many in the church face discrimination on the basis of multiple factors, which can compound experiences of injustice. Addressing discrimination requires us to acknowledge individuals impacted by ableism, audism, and all forms of oppression, and commit to removing systemic barriers in the Church and society. Even where we may be exempt from legal requirements to do so, the commitment to our baptismal covenant must obligate us to pursue these efforts as a matter of justice.

“Individuals with disabilities continually encounter various forms of discrimination, including outright intentional exclusion, the discriminatory effects of architectural, transportation, and communication barriers, overprotective rules and policies, failure to make modifications to existing facilities and practices, exclusionary qualification standards and criteria, segregation, and relegation to lesser services, programs, activities, benefits, jobs, or other opportunities ...”

It is our sincere hope that exclusion perpetuated by The Episcopal Church is not intentional. Regardless of the intent, however, the impact is the same. At all levels, we must ask ourselves and those affected what barriers remain. What rules and policies, facilities and practices, need modification? Where do exclusionary qualification standards and criteria remain? Where and how do we segregate persons with disabilities and those who are Deaf/deaf and hard of hearing? How can we improve access and inclusion in worship, programs, and activities? In all areas and aspects of the church – when we examine ourselves honestly – do we recognize persons with disabilities and those

who are Deaf/deaf and hard of hearing as fully capable and fully included, participating and leading? Are we willing to commit resources to this end? If not, why not?

“Census data, national polls, and other studies have documented that people with disabilities, as a group, occupy an inferior status in our society, and are severely disadvantaged socially, vocationally, economically, and educationally ...”

Our baptismal covenant calls us to “strive for justice and peace among all people and respect the dignity of every human being.” The work of advocacy alongside persons with disabilities and those who are Deaf/deaf and hard of hearing continues to be important and we affirm the faithful work of the Office of Government Relations, the Episcopal Public Policy Network, dioceses, and individual congregations and ministries in this arena.

“The Nation’s proper goals regarding individuals with disabilities are to assure equality of opportunity, full participation, independent living, and economic self-sufficiency for such individuals ...”

“Equality of opportunity” and “full participation” remain unrealized, “proper goals” within the church; the need for our support in all of these areas, in society, remains.

“The continuing existence of unfair and unnecessary discrimination and prejudice denies people with disabilities the opportunity to compete on an equal basis and to pursue (opportunities) ...”

In the Church, this comes back to fully being Beloved Community. When one person is denied the opportunity to reach the altar, to serve in leadership, to worship and learn and experience the fullness of community, we are not yet Beloved Community.

Prayer Resources and Litany of Repentance

Part of our charge was to consider resources for reconciliation for persons who have been excluded from church events. The following prayers are offered, which encompass experiences both inside and outside the church. The Litany of Repentance is offered as a step toward reconciliation.

Prayer for use by persons with disabilities and/or who are Deaf or hard of hearing:

God our Creator, by whom we are each wondrously made: you made me in your image, equip me with gifts, and pour your love into me; when people see me as different, other, unable, unworthy, broken, scarred, wounded, and anything less than whole, grant me courage and forbearance while you work in them; when I am weary of questions, stares, barriers, intrusions, indignities, oppression, and injustice, ease my burdens; when I am in pain, in body or soul, give me your comfort, healing, and peace; where you and the world need what I can uniquely offer, send me to serve in your Name; and help me remember, in and through all things, that you call me Beloved; through Jesus Christ our Savior. Amen.

Prayer for use by people who love and care for someone with disabilities and/or who is Deaf or hard of hearing; note that this uses the pronouns “they/them,” which may be substituted with pronouns preferred by the person included in the prayer:

God our Creator, by whom we are each wondrously made: you made (Name) in your image, equip them with gifts, and pour your love into them; when people see them as different, other, unable, unworthy, broken, scarred, wounded, and anything less than whole, grant me the courage to ask how I can be their best ally; when I see them in these ways, forgive me and break open my understanding; when either of us are weary of questions, stares, barriers, intrusions, indignities, oppression, and injustice, give me the courage to stay beside them, learn from their perspective, and ask what they would have me do; when they are in pain, in body or soul, teach me to be present and ask how to comfort and support them; help me honor the gifts you bring forth in them; and grant that, in and through all things, I acknowledge them as Beloved, as you yourself have named them; through Jesus Christ our Savior. Amen.

Prayer for use by a congregation or church body:

O God, who calls us into Beloved Community and sends us into the world as witnesses to your love: help us understand who is missing from this gathering (congregation, church), whose gifts we have limited, and forgive us for the barriers we place between your church and your people. Open our ministries, open our minds and our hearts, to include people whose gifts we have failed to honor, people we have believed unable to serve and to lead, and all we have failed to fully recognize as whole and holy. Help us remove the stumbling blocks between us and the community you call us to be; teach us to create new spaces, build new tables, and transform your church; and remind us, always, that people we may identify with disabilities, you have already named as Beloved; through Jesus Christ our Savior. Amen.

Litany of Repentance

Dear people of God, our church and our collective history bears the wounds of limitations, barriers, and oppression that we place between ourselves and those who differ from us. We do not fully respect human dignity.

We have failed to honor the ways you have wondrously made your children, failed to realize the gifts you have given, and not loved with the same love you pour out. The sins of the past and of our present day keep us from being the Beloved Community you intend.

We have created obstacles to reach spaces we hold dear, including the altars where we break bread and acknowledge the wounds of Jesus. We have not removed them even when made aware of their presence.

We have not respected the dignity of one another, as we vow in our baptism. We name inabilities and limitations instead of recognizing our siblings in Christ who are whole and holy. We have created barriers to learn, to serve, and to lead.

With our actions and inaction, in small ways and great, in things we do not even recognize, we have contributed to the disabling of other people.

As followers of Jesus Christ, we reject the oppression of other human beings on the basis of disabilities, differences, and the rich variety of ways God enables us to live and move and have our being.

We also recognize the temporary nature of our human condition and that many of us take for granted particular abilities we may now possess, including characteristics that are physical, intellectual, and related to our mental health.

As members of Christ's beloved community, we must work alongside all God's children, building up the gifts in each other and serving together for the sake of God's mission in the world.

In the assurance of forgiveness, let us be fully present before God and humbly confess our sins: our participation in disabling and "othering," our contributions to oppression, and our perpetuation of barriers and exclusion.

Silence is then kept for a time

God the Father, you created your people and called us Beloved, yet barriers and limits of our own making have separated us. *Have mercy on us.*

God the Son, you healed your people and restored them to community, yet the damage we cause continues to wound your body. *Have mercy on us.*

God the Holy Spirit, you stir among us, yet we fail to be aware of the gifts you bring near to us and the people you are enlivening in our communities. *Have mercy on us.*

We have celebrated our own abilities, while failing to acknowledge the full humanity of persons we deem less able than ourselves; we have limited the gifts that persons with disabilities and who are Deaf or hard of hearing bring to the Church. *Have mercy on us.*

We have failed to understand discrimination through the perspective of persons with disabilities and those who are Deaf and hard of hearing. We have not condemned behaviors and practices that limit and hurt God's children. *Have mercy on us.*

We have overlooked barriers and inequality in our church and our communities, and not acknowledged the limits that places on all of us. *Have mercy on us.*

We have practiced injustice with economic justification and not worked to relieve burdens that oppress others when we ourselves seem unaffected. *Have mercy on us.*

We have denied access to our churches and other sacred spaces, and even to Christ's table, with barriers we have created. We have failed to provide accommodations that enable full inclusion. We have preferred historic buildings and aesthetics over access. *Have mercy on us.*

We have limited access to events, meetings, conferences, camps, and seminaries, and chosen convenience over inclusion, without acknowledging the people we harm and the gifts this denies us. *Have mercy on us.*

We have erected unreasonable barriers that limit the vocations of people called to serve God through the Church, including access to formal discernment and formation for holy orders. *Have mercy on us.*

We have built ourselves up and held tightly on our own power by insisting on "fixing" circumstances for other people, in ways we ourselves choose, and have not asked about their needs or perspectives. *Have mercy on us.*

We speak of categories and conditions, we use labels and diagnoses, and fail to acknowledge personhood. *Have mercy on us.*

We have been impatient with people who learn and process experiences in ways different from our own. *Have mercy on us.*

We have separated ourselves from others, refusing to be present in ways that would help us understand and learn from their experiences. *Have mercy on us.*

We have disregarded people who need our help and not seen them as worthy of our love and care. *Have mercy on us.*

We have been fearful of people who are different from us. We have turned away. *Have mercy on us.*

We have ignored the sufferings of our siblings in Christ. *Have mercy on us.*

We have been satisfied with what is and who this excludes, while failing to recognize what could be. *Have mercy on us.*

Despite our intentions, we have not had the will and the courage to act in love for the sake of all God's people. *Have mercy on us.*

Lord have mercy. *Christ have mercy.* Lord have mercy.

May Almighty God have mercy on us, grant us the strength and conviction to love as you would have us love, and to acknowledge the many and varied gifts you give each of your children. Where there has been separation, may God reconcile us. Make us inclusive in God's church, bold in our actions in the world, and ever more compassionate in our love toward one another, that we may help realize the Beloved Community we are called to live into each day. Amen.

Recommendations

Formation and Ordination

We acknowledge that barriers remain which limit the vocations of people called to serve God through the Church, including access to formal discernment and formation for holy orders. We recognize barriers in language, culture, and physical space, and financial constraints, have limited access to ordination processes and formation. We encourage accessible alternatives in formation at all levels, with specific attention to formation for ordination. We commit to recommending alternatives in future work of this Task Force and collaborative efforts of the Episcopal Conference of the Deaf and a Disability Advisory Group.

Language Access

We urge the Church to be attentive to communication access needs at all levels, including diocesan conventions, churchwide formation, and congregational worship and programs.

Specific communication access requests for persons who are Deaf or hard of hearing should always be provided as a reasonable accommodation for full participation in meetings and activities of The Episcopal Church, whether the request is for American Sign Language interpretation or Communication Access Realtime Translation (CART) services. Deaf persons who request ASL interpretation should be provided with ASL; persons who are deaf and hard of hearing, who primarily use English, should be provided with captioning, Communication Access Realtime Translation (CART), or other services to meet communication needs.

- CART is used to transcribe spoken English into written English, while sign language interpretation is used to render American Sign Language (ASL) into spoken English and spoken English into ASL. It is also important to note that ASL is not the only signed language in use within the Episcopal Church.
- The reason why both ASL interpretation and CART services may be necessary is because some Deaf/deaf and hard of hearing people primarily communicate using English, while others use ASL. ASL and English are distinct languages and not all Deaf/deaf and hard of hearing people are able to use both for communication.
- Deaf persons who are native users of ASL should be provided with ASL; persons who are deaf and hard of hearing, who primarily use English, should be provided with captioning, Communication Access Realtime Translation (CART), or other services to meet communication needs. While captioning and CART technology may be useful for many in the Church, including persons who do not identify as Deaf/deaf, it does not “replace” ASL as a language.

Liturgy

We encourage official revisions of the Book of Common Prayer, and all liturgies written for use in the Church, to use language that acknowledges the personhood of Deaf/deaf and hard of hearing people and people with disabilities, rather than categorizing by afflictions, conditions, and other general descriptors, such as referring to “the homeless.” As language and usage is ever-evolving, we strongly recommend consulting with Deaf and disability communities when revising liturgical language.

All references that use terminology of disabilities or deaf as metaphors for sins or failings should be revised. Specifically, we draw attention to:

- The Litany of Repentance for Ash Wednesday (BCP, p. 267), “We have been *deaf* to your call to serve ...”
- The Good Friday prayer (BCP, p. 279), which focuses on conditions without acknowledging personhood, referring to “the sick, the wounded, and the crippled.” Here, the term “crippled” is especially problematic, as it has been considered pejorative since the 1970s and is offensive to many persons with disabilities. For this line of the prayer, we recommend: “For people who are sick, wounded, or who have disabilities.”

As acceptable terminology used to refer to Deaf/deaf and hard of hearing people and people with disabilities may vary between countries and languages, we strongly recommend that local Deaf and disability communities be consulted whenever The Book of Common Prayer is being translated or retranslated.

Funding

We note the importance of having persons with disabilities and Deaf/deaf or hard of hearing people serving on interim bodies of General Convention and in leadership roles at all levels of the Church. We recognize that access and representation often require allocation of funding for reasonable accommodations. We are pleased that the Office of General Convention made arrangements for the cost of interpreting, providing language accessibility for this Task Force.

In the legislative work of General Convention, and in Diocesan Conventions, we note that resolutions often require adequate and specific allocations of funds to achieve the goals approved; we urge continued work with fiduciary bodies of the Church in order to achieve goals passed in such resolutions. Creating justice in the present and future Church requires appropriate allocation of funds, which should be considered by leadership bodies at all levels.

Gratitude

- We commend the work of the Episcopal Public Policy Network, and the Office of Government Relations for their efforts in work connected to the concerns of people with disabilities and Deaf/deaf and hard of hearing people.
- We acknowledge the work of General Convention and contributions in dioceses, congregations, and other entities of the Church, where progress has been made toward more full inclusion of people with disabilities and Deaf/deaf and hard of hearing people.
- We are grateful for the work of the Episcopal Conference of the Deaf, the former Episcopal Disability Network, and the many individuals who have paved the way for our work in the Episcopal Church today.

Continuance recommendation

We recommend continuation of the Task Force on Disability and Deaf Access, as current members are able to do so, until the next, in-person General Convention.

Part of the work of this task force includes providing resources for persons with disabilities and who are Deaf/deaf and hard of hearing who may attend General Convention, as well as consulting with organizers of General Convention on communication and other accessibility needs.

As this group has not used the funds allocated for its work, we request that access to such funds be granted through the next in-person convention.

We envision the following timeline:

February-June 2021 – Curation of resources, focus groups; discussion and action regarding further recommendations, consideration of possible future resolutions and advocacy; and communication with General Convention staff regarding accessibility for online meetings of Convention in 2021.

July-December 2021 – Preparation of resources/guide for in-person General Convention in July 2022 and arrangements for presence at Convention; continued communication regarding accessibility of online meetings prior to in-person General Convention and the anticipated in-person General Convention in 2022; and continued curation of resources to make available online.

January-July 2022 – Final preparation of materials, resources, etc., and presence at General Convention.

Disability Advisory Group

We recommend formation of an on-going Disability Advisory Group, to:

- Offer support for individuals with disabilities
- Collaborate with the Episcopal Conference of the Deaf
- Collaborate with disability organizations of other denominations
- Curate resources and make such resources available online
- Consult and offer support for congregations, dioceses, and other church institutions and leadership bodies
- Support advocacy and education

Recognition in the Church

We recommend that the Episcopal Church recognize the presence of the Episcopal Conference of the Deaf and a Disability Advisory Group, and other appropriate means, so that there is:

- A continued place for the work of people with disabilities and Deaf/deaf and hard of hearing people in church-wide structures, rather than representation requiring legislation of General Convention every triennium
- Representation for both the Episcopal Conference of the Deaf and a Disability Advisory Group online at episcopalchurch.org, enabling access and connection.

TASK FORCE ON FORMATION & MINISTRY OF THE BAPTIZED

Membership

Dr. Lisa Kimball, <i>Chair</i>	Washington, III	2021
The Rt. Rev. J. Russell Kendrick, <i>Vice-Chair</i>	Central Gulf Coast, IV	2021
The Rev. Paul Aparicio	Fond du Lac, V	2021
Ms. Lisa Brown	Pittsburgh, III	2021
The Rev. Canon Lydia Kelsey Bucklin	Northern Michigan, V	2021
The Rev. Heather Erickson	Los Angeles, VIII	2021
The Rt. Rev. Carol Gallagher	Massachusetts, I	2021
The Rev. Canon Timothy Hodapp	Connecticut, I	2021
Ms. Demi Prentiss	Dallas, VII	2021
Ms. Melissa Rau	Southwest Florida, IV	2021
The Hon. Byron Rushing	Massachusetts, I	2021
The Rev. Peter Wong	Central Gulf Coast, IV	2021
The Rt. Rev. Robert Wright	Atlanta, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Dr. Susanna Singer (Chair) resigned in January 2019 due to family demands, and Dr. Lisa Kimball agreed to assume the responsibility of Chair. The Rev. Heather Erickson was then appointed to join the Task Force to maintain its original size.

Mandate

2018-Co05 Appoint Task Force to Study Implementation of Canon III.1

Resolved, that the 79th General Convention direct the President of the House of Deputies and the Presiding Bishop of The Episcopal Church to appoint a Task Force on Formation and Ministry of the Baptized including members experienced in Christian formation and education, and consisting of a minimum of two bishops, five (5) priests and/or deacons and five (5) lay persons, who represent the diversity of the Church; and be it further

Resolved, that this task force identify or develop curricula, practices, and strategies that can be used by dioceses and congregations to encourage and engage all the baptized in the work of building up the church by identifying their gifts for ministry, employing their gifts for ministry, and focusing on full engagement of their ministries in daily life, work, and leisure; and be it further

Resolved, that this task force report to the 80th General Convention with recommended strategies for the affirmation, development, and exercise of ministry by all baptized persons in the areas of gifts discernment, education and training for ministry, and leadership development; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$60,000 for the implementation of this resolution.

Summary of Work

As the Task Force on Formation and Ministry of the Baptized we have come to believe, and we submit this report as our heartfelt brief, that our beloved Episcopal Church is confronting an existential hinge point. This critical moment has overtaken us gradually and then suddenly, accelerated by the twin catalysts of the global pandemic and long overdue racial reckoning. Most certainly, as we emerge from these times of testing, “we shall all be changed” (1 Corinthians 15:51). Our future as “the Episcopal branch of the Jesus movement” will depend on engaging the whole church -- all the baptized, especially the 99.2% who identify as laity.

To create the vital corporate life that is the hallmark of God at work, we believe the Episcopal Church must act decisively, with energy, focus, and intention. We must commit the resources of the Episcopal Church to

1. Support and develop connections among existing initiatives and networks that prioritize baptismal theology; and
2. Form every baptized member as a practitioner of Jesus’ Way of Love, proclaiming baptismal ministry as their calling through our intentional, daily engagement with the entire People of God.

We offer this report and the resolutions contained herein as the articulation of our case, and as our bid for your commitment to address this besetting issue which challenges us to do justice in our own house.

What is our mission?

The creation of this Task Force at the 79th General Convention acknowledges the Episcopal Church’s failure to implement the stipulation of Title 3, CANON 1: *each diocese shall provide resources for the formation and ministry of all the baptized.*

In response to the Task Force’s expansive mandate to “identify or develop curricula, practices, and strategies that encourage and engage all the baptized and help them to identify and employ their gifts for ministry in daily life, work, and leisure,” the Task Force determined early that developing new curricula would not be prudent. We chose to focus on identifying resources and strategies that effectively align Episcopal congregational practice with the baptismal theology of The Book of Common Prayer 1979.

We discerned a three-fold path for our work:

- Use Episcopal baptismal theology
- to examine the formation practices and needs of the Church, in order to
- commend practices, resources, and institutional supports to equip and sustain Christian disciples and a thriving Church.

What does baptismal theology mean for the Episcopal Church?

To begin our process, we examined the baptismal theology embedded in the BCP 1979. We discerned that the “Prayer Over the Newly Baptized” (BCP 308) describes well both the profile of a fully-flourishing baptized person, and the focal point of our response to our mandate:

Heavenly Father, we thank you that by water and the Holy Spirit you have bestowed upon these your servants the forgiveness of sin, and have raised them to the new life of grace. Sustain them, O Lord, in your Holy Spirit. Give them an inquiring and discerning heart, the courage to will and to persevere, a spirit to know and to love you, and the gift of joy and wonder in all your works. (“Prayer Over the Newly Baptized,” The Book of Common Prayer)

We drew inspiration for understanding “ministry in daily life” as a Biblical mandate from Jesus’s own witness in the Gospel of John. As Episcopalians, our faith in the Triune God requires us to incarnate both our dependence on God alone and our responsibility to love our neighbors.

You call me Teacher and Lord—and you are right, for that is what I am. So if I, your Lord and Teacher, have washed your feet, you also ought to wash one another’s feet. For I have set you an example, that you also should do as I have done to you. (John 13:13-15, NRSV)

The Iona Community “Prayer for Friday” elegantly clarifies the Task Force’s operative distinction between formation for daily baptismal living (discipleship) and formation for membership in an institutional church:

O Christ, you are within each of us.

It is not just the interior of these walls:

It is our own inner being you have renewed.

We are your temple not made with hands.

We are your body.

If every wall should crumble, and every church decay,
We are your habitation.
Nearer are you than breathing,
Closer than hands and feet.
Ours are the eyes with which you in the mystery,
Look out with compassion on the world.
Yet we bless you for this place,
For your directing of us, your redeeming of us,
And your indwelling.
Take us outside, O Christ, outside holiness,
Out to where soldiers curse and nations clash
At the crossroads of the world.
So shall this building continue to be justified.
We ask it for your own name's sake.
AMEN.

How does baptismal theology inform our work?

We articulated two foundational principles on which we focused our research and fashioned our recommendations:

All who are baptized are empowered to minister the Gospel, in all places and at all times.

- In baptism, we are claimed by God and consecrated as citizens of God's reign;
- In baptism, we are equipped to join Jesus and change the world through prayer and action, motivated by love and justice;
- In baptism, we are shaped by the Spirit as disciples and sent by that same Spirit as apostolic ministers into every place where we live and work, play and pray; and,
- In baptism, we join the living Body of Christ and the great movement of saints throughout time to participate in God's mission and to build the Beloved Community.

All the baptized are called into discipleship, shaped by the Baptismal Covenant, to engage lifelong learning and ministry, by:

- Participating in expressions of faithful Christian community;
- Exercising theological imagination;
- Discerning gifts for ministry;

- Developing a rule of life rooted in spiritual practices; and
- Joining in God’s mission by applying these gifts within the individual’s particular context and life.

This sacred practice of lifelong learning is to be encouraged, nurtured, celebrated, and accompanied at the local level, where each baptized member’s formation is embodied within a specific worshiping context and culture. A thriving church shares in God’s mission by supporting all the baptized in their vocational journeys with Christ.

What is the current condition of baptismal identity and formation across the Episcopal Church?

In January 2020 we worked with the GCO office to administer—in Spanish, French, and English—a church-wide survey on formation resources and practices for all Episcopalians.

Our goal was to ascertain:

- How baptismal identity shapes ministry in church, daily life, work, and leisure;
- What curricula, practices, and strategies already exist and are being used widely and effectively by individuals and communities across the Episcopal church; and
- What barriers prevent people from growing into their full identity as baptized Christians.

We intentionally promoted the survey via social media, at church gatherings including Rooted in Jesus and the CEEP 2020 conference, and among historically underrepresented communities. We received 687 completed surveys, 55% from laity, 8% from self-identified ethnic/racial minorities, and 57% from those not raised in the Episcopal Church. Regrettably, only 25% were under the age of 50, reflecting both the aging demographic of our denomination and the difficulty reaching younger generations, who tend to be less closely affiliated with the governance of our Church.

Our findings were illustrative and clear.

As documented by previous church-wide bodies with similar mandates, and as experienced by church leaders committed to deep Christian formation, we discovered that while rich baptismal theology exists, a significant gap remains between what we believe and how we form individuals to live as Christians in the world. There is an urgent need to ground Episcopal Church practice and Episcopal identity in vows made and witnessed at the font. While we as a church who share these vows are called to declare our support with a resounding “We will,” far too often we have not.

Respondents affirmed that the Christian life is a journey with God in community, where discipleship as a follower of Jesus is learned through enculturation in worship, study, service, and genuine fellowship. Yet, disappointingly, there was a pervasive tone of “I’m on my own” across the survey responses.

When mentioning the various practices, programs, and circumstances that were most conducive to spiritual growth and formation, the underlying assumption and common thread was that they occurred in relationship to other Christians. For survey respondents, spiritual growth is fostered by utilizing spiritual gift assessments in group contexts; through discernment and clearness committees; via spiritual direction with a mentor; in time spent together in an intentional community, often on retreat or at camp; and through regular engagement with others at Bible studies and adult formation offerings. Regardless of curriculum or program, the transformational catalyst that ultimately led to spiritual growth and formation was the intentional collaborative engagement and deep relational connections formed in community.

Respondents also emphasized a need to empower the laity in order to reduce clericalism. They recognized that this crucial shift requires prioritizing opportunities for lay-led faith-sharing experiences and spiritual mentoring. Survey responses clearly indicated that no program, course of study, or particular body of knowledge is enough to form confident Christians. The “magic sauce” is healthy relationships that support ongoing--God willing, life-long--theological reflection and vocational discernment.

A significant majority of respondents (over 70%) yearned for a fundamental culture shift in congregations, a re-prioritizing of resources. They longed for intentional faith formation to foster continuous discernment and discipleship in community. They hungered for a recognition of the essentials of incarnation: by virtue of being human, we are wired for relationship; by virtue of our baptism, we are equipped for ministry.

What’s the problem? Why isn’t the church’s approach to formation “working”?

There are rich church-wide programs, resources, networks, and well-established processes to grow Christians, but our data suggests that while a core group of Episcopalians is over-resourced, many more congregations do not access or utilize what is available or they limit Christian formation to models of expert-centered instruction over experiential communal practices.

Despite the increased visibility of the Presiding Bishop and his emphasis on the Way of Love, the Beloved Community, and Embracing Evangelism, all of which are richly resourced initiatives, many of our respondents describe congregations with very limited imagination for discipleship or ministry in daily life. Respondents’ formation experiences were confined to specific programs, usually “at church” and developed locally. Ministry was most often understood as acts of service in or on behalf of the congregation.

(It should be noted that after our survey was administered, the great accelerator effect of COVID-19 has pressed congregations to rethink their formation ministries. To the extent time and resources have been committed to formation-under-pandemic, programming has moved online and there is evidence of growing appreciation for the importance of faith practices in the home.)

What are the challenges we face?

The episodic nature of Christian formation at the local level is ubiquitous. The survey confirmed our own experience. By far a majority of congregations represented in the data offer a menu of Advent and Lent programming, an adult forum on Sunday mornings September through May, one weekly Bible study, and as much children's and youth formation shaped by demand and the personnel to provide it. Preparation for baptism, confirmation, and marriage most often falls to the clergy, and is offered when there is need. A culture of coherent, continuous and holistic formation from birth to death, altar to kitchen table, and Advent to Christ the King Sunday, rooted in ongoing relationships and practices, is an unrealized, distant ideal. Instead, respondents described their formation as scattershot, occasional, accidental, seasonal, heavily cognitive, and leader-dependent.

Respondents emphasized the need for and power of mentorship and good modeling. Most cited a shortage of identified Christian mentors, which places unrealistic expectations on clergy, stifles spiritual growth, and forces individuals to look beyond their local congregations for quality catechesis and theological education. Sadly, many clergy feel unprepared to teach, particularly to children and youth.

What we renounce and what we affirm in the process of ongoing conversion as Christians matters deeply; yet few respondents were able to articulate why baptism matters in daily life. It is clear there is much room to improve the teaching and practice of baptismal theology which must include regular opportunities for communal discernment of gifts and equipping for ministry in daily life. The church cries out for an increased emphasis on forming and nurturing deep relationships among fellow Christians.

Finally, maturing in faith seems to be conflated with active involvement, and is recognized almost exclusively by opportunities to serve inside the Episcopal Church at the parish, diocesan, or church-wide level, or by ordination. God's clear call to vocation in the world seems to escape the church's notice. Very few people referred explicitly to either their baptism or the Baptismal Covenant as a roadmap for daily living, with the exception of their commitment to social justice which was frequently supported by "Love your neighbor as yourself" and "Respect the dignity of every human being."

In light of all this, where is the hope?

The Episcopal tradition is well equipped to form disciples for ministry in daily life. The pattern exists theologically and liturgically, particularly in the rhythms of the daily office; the catechumenate (Book of Occasional Services 2018); the renunciations, affirmations and covenant language in Holy Baptism; and in "An Outline of the Faith" (Catechism, BCP 845).

Around the Church today, many dioceses, schools of theology, worshiping communities, networks, and publishing houses are engaged in this critical work of formation oriented toward daily life. In our survey we found good examples of existing resources and practices, and evidence of the resilience,

creativity, and hunger of baptized Episcopalians to be equipped for daily life ministry in a world that is changing under our feet.

We offer the following story as an example of transformation that often goes unnoticed outside a small circle, and that kindles hope among all who are touched by it.

JO'S STORY

Josephine (Jo) is a 32-year-old wife, mother of three small children, and nutrition coach who works on the executive staff of a nationwide weight-loss and personalized meal-planning organization. "I wanted something more," she began, explaining her on-again, off-again relationship to the Episcopal Church in which she was baptized as an infant. "Sure, once my husband and I started having kids, church became important again. Passing along something of what I knew as a kid with church school and camp felt like something we should do."

When Jo's rector asked for volunteers who might be interested in learning some spiritual practices together, she signed up. "We basically learned how to listen. Who knew? And how to listen deeply, for God's voice in scripture and for God to show me what He wanted me to notice whenever I was out and about... home, neighborhood, the office, school." Then, with enthusiasm, she spoke of her small community of companions who were learning these practices together. "It took a bit of time to feel comfortable. Here I was sharing stories of my life and God and family with people who weren't close friends. And in no time, we became a small community of companions who were listening to each other's stories of where God is showing up in our lives. And then, we began to discern what these practices might mean for our parish." Then COVID-19 hit "and the world tipped." In the months following the onslaught of the pandemic, the small group continues to gather, dwelling in God's word and listening, discerning, what God may be inviting the group to see. "This whole pandemic means something different to me because of what I've learned with this group," Jo said. "I trust my peeps with these stories of my life. And they trust me. Also, in some small significant ways, I'm meeting Jesus out there in the eyes of the girl in the produce aisle, online with my colleagues in endless meetings, and with parishioners on Sundays, in my husband and my kids. For the first time in my life I feel like I'm meeting Jesus everywhere. He's alongside me and we're engaged in a way I never knew was possible."

Jo's story sheds light on the stunning potential for any of us to receive a deepening experience of our baptismal covenant. It is possible to engage theological imagination at the parish level. It is possible that those who yearn to deepen their understanding of faith can be surprised, joyful, and encouraged as they reflect on what God might be up to. It is possible that God is transforming us within every aspect of our lives and within the communities and relationships where we live and move.

Jo's story, and many more that we heard through our research, confirm what we suspected. God is continually inviting all baptized people to lives of meaning and purpose, using their gifts for a greater good. There are wonderful stories of conversion, transformation, and Christian vocation. There are deep relational connections--such as those formed by members of our Task Force--that exist among

practitioners and transcend geographic and institutional boundaries. There are rich resources and ancient practices to feed the people of God, but sadly, our institutional structures have not focused on encouraging baptismal formation or deepening relationships among the baptized.

The time is right for the Episcopal Church to dedicate financial resources to better align formation priorities for baptismal living with existing resources through improved churchwide communication and access.

What can the Church do now?

Simply put, the Task Force has oriented our work toward a strategy for a renewed Church in the 21st century, moving from a notion of “church as membership” to “church as the living Body of Christ”; re-orienting from ecclesio-centric ministries to missio-centric practices for parishes and worshipping communities; shifting from the vocation of the professionally trained “few” to the vocation of the locally trained “all”; turning from simply worshipping on Sunday (what I do) to bearing witness to the gospel 24/7 (who I am); and, growing from baptism as a mere social event that confers redemption to baptism that obliges the church to engage every citizen of God’s reign in life-long formation.

It is time for the Episcopal Church to “walk its talk” on baptismal theology.

- General Convention must authorize the establishment of a Standing Commission on Formation and Ministry Development as an outward and visible sign of our commitment to the ongoing work of making baptized disciples who make disciples for God’s mission in the world.
- Churchwide digital access is needed to existing resources and practices for baptismal ministry in daily life, and to establish systems of mutual accountability for congregations, Commissions on Ministry, theological education programs and seminaries. It is time to expect more of our local congregations as faith-forming communities.
- We have participated in the development of *A Christian Life of Faith: Signs and Thresholds Along The Way*, and now commend it to the Church as a roadmap for intentional discipleship in daily life. (See Supplemental Materials)

Why does it matter more than ever?

The raging of dual pandemics-- racism and COVID-19 -- has made our Task Force work more urgent and more relevant. As churches were forced to close their buildings, scramble online, and re-imagine ministry, congregations were challenged to define what it means to be a faithful Christian and an active Episcopalian. As infection and death rates soared, quarantine and isolation prevented regular contact with people we love, social distancing and mask wearing became essential life-saving acts, and people found themselves immersed in racial reckoning. Suddenly, what we renounce and what we affirm at baptism has taken on new significance.

The focus of the work of God’s people did not change with the onset of the COVID-19 pandemic and the urgent struggle against racism, white supremacy, and anti-Black bias. In fact, the work of love and justice became all the more pressing, especially as the pandemic disproportionately devastated Black, brown, and indigenous communities. If baptism is our response to God’s invitation to life, then our “yes” is embodied within each of us, shaping and forming us in The Way of Love, ordering and re-ordering our lives, and binding us to the truth that all are born of the one God and deserving of respect.

Our Task Force has been charged with developing resources for “building up the church.” The most important resource for that renewal is the commitment by each congregation, lay person, deacon, priest, and bishop to activate baptism. We can choose to live as if we actually believe “the church carries out its ministry by the ministry of [ALL of] its members” (BCP 855), recognizing our membership is born at the font. Our covenant holds us--and you, our siblings in Christ--accountable to making and living that stunning, egalitarian promise.

How did we come to these conclusions?

Our Task Force was very active and established strong, sustaining relationships with one another as we conducted our work. We met in person twice: March 20-22, 2019 at the Hyatt Regency, O’Hare, Chicago, and October 1-3, 2019 at Virginia Seminary. In between and through 2020, the Task Force met most months via Zoom, with two active working groups: Resources, and Theological Foundation & Contextual Rationale.

In addition, Task Force members leveraged our relationships across the Church and collaborated with formation networks and bodies including Forma, the General Convention Task Force on Theological Networking, Commissions on Ministry, Living Stones/Total Ministry, and Baptized for Life. Two members served on the development team for *A Christian Life of Faith: Signs and Thresholds Along the Way*, a resource to guide lifelong faith and ministry development for baptized Episcopalians (see Resolution ___ below). One member participated in the creation of materials for the *Embracing Evangelism* series. Each Task Force member served as an ethnographer, gathering descriptive data on the condition of formation for baptismal ministry in their ministry context. Given that our membership includes all orders of ministry, members who range in age from mid-thirties to mid-seventies, and individuals resident in seven Provinces, we represent the broad Church. These objective demographic realities, added to our lived experience of race, class, ethnicity, gender, sexual orientation, and theology guaranteed passionate discussions in our meetings!

What’s Next, January 2020 - July 2022

While our official status as a Task Force ends with the submission of this report, members have committed themselves to continue the work begun here in preparation for General Convention 2022. We look forward to being available to work with members of the GC Committees to which our Resolutions are assigned, thus laying a foundation for the resolutions offered here.

To the extent our time allows, we will be working to:

Promote connection and resource exchange among existing initiatives and networks that prioritize baptismal theology (as described in our foundational principles) in order to build momentum toward improved coordination and impact. Examples include:

- Embracing Evangelism⁽¹⁾
- Becoming Beloved Community⁽²⁾
- Way of Love⁽³⁾
- Baptized for Life⁽⁴⁾
- Total Ministry for Today's Missional Church⁽⁵⁾
- Journey to Baptismal Living⁽⁶⁾
- Forma⁽⁷⁾
- Select Commissions on Ministry

Promote examples of existing resources and proven practices for forming baptismal ministry as the calling of every baptized member. In particular, tools for gifts discernment and selection of contextually-appropriate curriculum will be elevated. Two excellent examples:

- A Christian Life of Faith: Signs and Thresholds Along the Way⁽⁸⁾
- How to choose a curriculum?⁽⁹⁾

Our research (survey, interviews, resource mapping) revealed THREE TASKS OF A THRIVING CHURCH

1. Discern - ongoing support for all the baptized to identify their gifts for ministry
2. Practice - resources and opportunities to equip the baptized to employ their gifts for ministry
3. Accompany - affirm and support the baptized for the full engagement of ministry in daily life

The following affirmation and resolutions are crafted toward a vision of thriving congregations that fulfill these tasks such that all baptized persons are encouraged to discern their gifts for ministry and exercise them with confidence.

End Notes

- (1) <https://episcopalchurch.org/embracing-evangelism/series>
- (2) <https://episcopalchurch.org/beloved-community>
- (3) <https://episcopalchurch.org/way-of-love>
- (4) <https://baptizedforlife.org/>
- (5) <https://www.facebook.com/groups/931342414039535>
- (6) <https://journeytobaptism.org/>
- (7) <https://www.forma.church/>
- (8) https://drive.google.com/file/d/1eNoyGd_F2ozst2LpQQB2nL6aycKyj4xD/view
- (9) <https://buildfaith.org/choosing-curriculum/>

Affirmation of Resolution to Establish a Standing Commission on Formation and Ministry Development

We strongly support Resolution A037 submitted to the 80th General Convention by the Standing Commission on Structure, Governance, Constitution and Canons to amend Canon I.1.2.n to Establish a Standing Commission on Formation and Ministry Development.

“A Standing Commission on Formation and Ministry Development. The Commission shall coordinate and encourage the development of all orders of ministry, encouraging and engaging all the baptized in the work of building up the church and developing best practices to ensure all churches benefit from the diversity of leadership gifts God has given us.”

EXPLANATION

Restoring a single Standing Commission to focus on ministry and formation would sustain the significant work that is needed in areas of Title III as they impact the 99.2% of the Episcopal Church that is not ordained. It would demonstrate the Church’s commitment to its baptismal theology and its accountability for the ongoing formation of Christian disciples across the life course, by prioritizing resources and offering structural oversight.

Proposed resolutions

A103 Describing a Christian Life of Faith in the Episcopal Tradition

Resolved, the House of _____ concurring, That the 80th General Convention commend to each diocese A Christian Life of Faith: Signs and Thresholds Along The Way as a discernment tool and formation guide for baptized Episcopalians, directing it particularly to Commissions on Ministry as a resource to fulfill Title III: Canon 1: Of the Ministry of All Baptized Persons which states, “Each Diocese shall make provision for the affirmation and development of the ministry of all baptized persons”; and be it further

Resolved, that Executive Council appoint a liaison to the “Christian Life of Faith” writing group for the purposes of regular communication and mutual accountability.

EXPLANATION

A Christian Life of Faith: Signs and Thresholds Along The Way is designed to encourage and engage all the baptized in the work of building up the church by identifying their gifts for ministry, employing their gifts for ministry, and focusing on full engagement of their ministries in daily life, work, and leisure. Fortunately, there are recognizable signs of maturing in our relationship with God. They are

marks of our deepening knowledge and understanding, the shaping of our values and attitudes, as well as the honing of our practices and skills. As we more fully embrace our identity as disciples and members of the Body of Christ, there also are thresholds that we can cross — Claiming, Engaging, Sustaining, and Cultivating / Catalyzing. Each threshold marks accepting increased responsibility to proclaim God’s loving, liberating, life-giving Good News (evangelism) and to help others to find their paths as we pass on our faith (faith formation).

The document identifies these signs and thresholds as markers of maturation during a faith-filled journey. The first part of the document is primarily for individuals who may want to wonder, widen, and deepen their understanding of themselves and of God. For these individuals, the signs and thresholds are a type of discernment or self-assessment tool to prompt reflection upon where they are in their personal faith and ministry development. The hope is that individuals will find descriptions that affirm their strengths and capacities, as well as indicate areas where they may want to stretch and search for resources that enhance spiritual growth and leadership.

The second part of the document is primarily intended for those responsible for passing on the teachings of the church (Commissions on Ministry, faith formation leaders, spiritual directors, clergy, vestry members, chaplains, diocesan directors, etc.). This section compiles the signs and thresholds into a grid for comparison across thresholds. The grid is designed to help facilitators, companions, and/or teachers to see the scope and sequence of how the stages relate and guide their adaptation of educational and formational resources for local contexts. The hope is that the signs and thresholds will promote deeper faith and ministry development in a congregation, intentional community, or diocese as, together, we move ever closer to the dream of God.

A104 Creation of a Digital Hub for Formation Resources (in English, Spanish, and French)

Resolved, the House of _____ concurring, That the 80th General Convention instruct Executive Council to implement the recommendations of the Task Force on Formation and Ministry of the Baptized and the Task Force on Theological Networking to develop a plan for a sustainable digital hub for Episcopalians to access formation resources for lay and ordained vocations; and be it further

Resolved, that Executive Council present a report with the plan (to include recommended structure, content, staffing, timeline, and budget) to the 81st General Convention; and be it further

Resolved, that \$30,000 be budgeted for the work of developing this plan over the next triennium.

EXPLANATION

Most church-wide funding for formation is currently committed to the discernment, preparation and practice of ordained ministry, while 99.2% of our Church is baptized lay members. The most recent projections of Episcopal Church membership are dire. No amount of restructuring or reimagining

local ministry will grow a vibrant church without a consistent commitment to lifelong Christian formation, the making of disciples who make disciples.

As our research over this past triennium has demonstrated, the Episcopal Church is blessed with formation resources (curriculum and proven practices), gifted Christian educators, writers, artists, videographers, publishers, and networks dedicated to formation, evangelism, discipleship, camps and conference ministries, chaplaincies and more, but, tragically, efforts are siloed. Local congregations are often unaware of all that is available, have difficulty accessing quality resources for their context, and/or do not have clergy or lay leaders trained to teach the faith well.

There is an urgent need for easily accessed, open source formation resources from discernment practices through preparation for ministry in daily life, including ordination. As a denomination, we must move from a free market system of resource distribution toward a collaborative clearinghouse that curates and promotes theologically and pedagogically robust resources for use in diverse cultural contexts. We need a denominational portal for individuals, congregations, schools, chaplaincies and camps, Commissions on Ministry, seminaries, diocesan schools, and Episcopal leaders to access resources to grow faith and live our baptismal theology with confidence.

Such an undertaking is ambitious and requires leadership at the church-wide level to emphasize the urgency, increase visibility, and establish accountability. The Anglican Communion has set a good example with its Season of Intentional Discipleship

(<https://www.anglicancommunion.org/mission/intentional-discipleship.aspx>).

Other denominations in the U.S. have made similar commitments, for example the United Methodist Church (UMC)'s e-learning discipleship platform <https://discipleship-ministries.teachable.com/> and ResourceUMC, the online destination for Methodist leaders <https://www.resourceumc.org/>.

Continuance recommendation

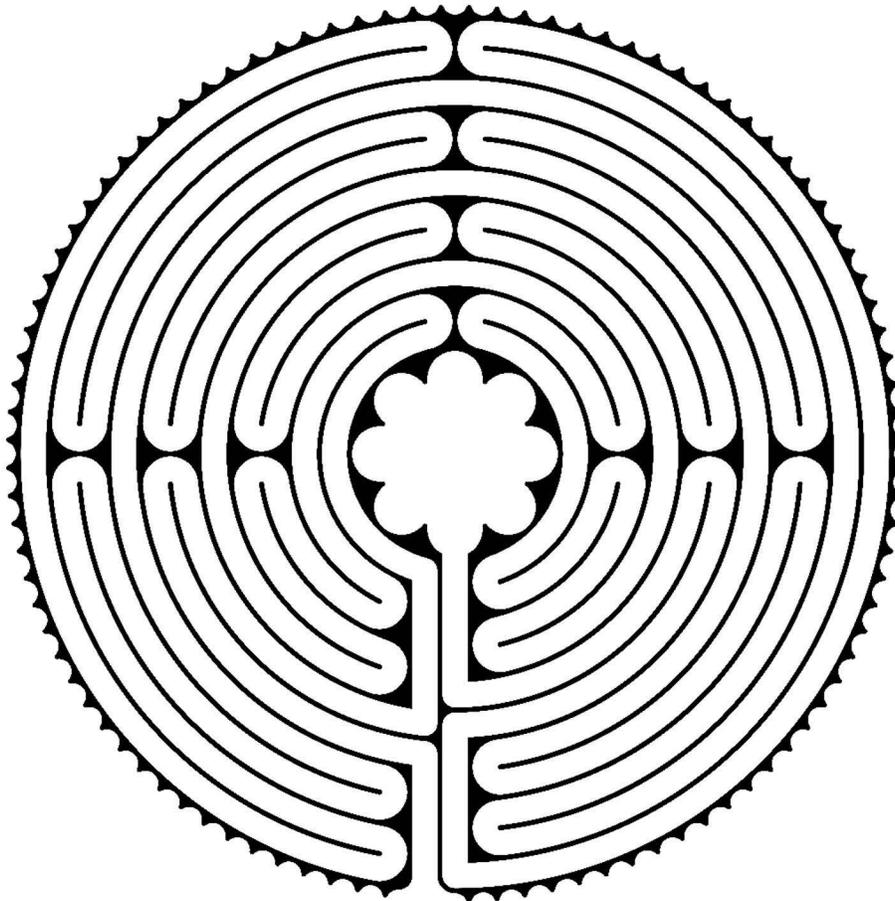
It is essential that a General Convention-appointed, church-wide body continue to dedicate itself to the Formation and Ministry of the Baptized. Rather than recommend a continuance of this Task Force we enthusiastically support the Resolution from the Standing Commission on Structure, Governance, Constitution and Canons to amend Canon I.1.2.n to Establish a Standing Commission on Formation and Ministry Development. In the event such a Standing Commission is not established, we recommend continuance of this Task Force.

Supplemental Materials

Table of contents:

1. [A Christian Life of Faith](#)

A Christian Life of Faith: Signs and Thresholds along The Way



I AM
A BAPTIZED CHRISTIAN
WHO WONDERS...

How can I participate in and practice a Christian life of faith as a baptized Episcopalian, conforming to Christ's way of life and continually being transformed on my lifelong journey of faith?

FOLLOWING THE WAY

A Christian life of faith is premised on being in relationship with God and with God's people. We have assurances from those who have come before us that God wants us to have life and have it in abundance. We claim this fullness of life as we travel with God on a journey that has three dimensions:

- ***It is lifelong***—unfolding chronologically across one's life;
- ***It is life-wide***—integrating formative events and experiences from across one's contexts; and
- ***It is life-deep***—making meaning influenced by culture, beliefs, attitudes, emotions, ideologies and values.

As we meander through life's labyrinth, individually and in community, we gain insights and make connections between and across our experiences of faith in the church and in the world. Through them we glean a glimpse of the dream God offers. Sometimes the path to reach it is clear; other times it seems illusive. Fortunately for those of us who want help navigating our way, there are recognizable signs of maturing in our relationship with God. They are marks of our deepening knowledge and understanding, the shaping of our values and attitudes, as well as the honing of our practices and skills. As we more fully embrace our identity as disciples and members of the Body of Christ, there also are thresholds that we can cross. These steps mark accepting increased responsibility to proclaim God's loving, liberating, life-giving Good News (evangelism) and to help others to find their path as we pass on our faith (faith formation).

This document is our attempt to identify the signs and thresholds of a faith-filled journey. It is designed in two parts which reflect the ways two groups likely will use it. Both parts of this booklet include the same signs and thresholds; the signs and thresholds are just presented differently. The first part is primarily for individuals who may want to wonder, widen, and deepen their understanding of themselves and of God. For them, the signs and thresholds are a type of discernment or self-assessment tool to prompt reflection upon where they are in their personal faith and ministry development. This section identifies four thresholds—Claiming, Engaging, Sustaining, and Cultivating/ Catalyzing—and uses each "stage" or "phase" to organize the typical focus, questions, and signs of someone in this space. The hope is that individuals using this part will find descriptions that resonate and affirm their strengths and capacities as well as indicate areas where they may want to stretch and search for resources that enhance spiritual growth and leadership. The second part is primarily intended for those responsible for passing on the teachings of the church (such as Vestry members, Commissions on Ministry, faith formation leaders, spiritual directors, clergy, chaplains, diocesan directors, etc.). This section compiles the signs and thresholds into a grid for comparison across thresholds. This design should help facilitators, companions, and/or teachers to see the scope and sequence of how the stages relate and guide their adaptation of educational and formational resources for local contexts. The hope is that the signs and thresholds promote deeper faith and ministry development in a congregation, intentional community, or diocese. Regardless of the form you use, we hope you find it useful.

The seeds of this document were planted in the summer of 2019 when colleagues in faith formation and ministry development circles embraced God's invitation and committed to produce this guide. It is our gift to the church. Recognizing that it is only a starting point, we want (and need) to hear your reactions to it, especially as you use it in your context. Tell us what is missing and how can it be improved and refined. Send your feedback and recommendations to Julie Lytle at jlytle@bexleyseabury.edu. We offer our thanks and blessings for your journey!

Ellen Bruckner, Kate Gillooly, Lisa Kimball, Julie Lytle, Deborah Bressoud Parker, Sharon Ely Pearson, Tina Pickering, Melissa Rau, Amy Cook, Vicki Garvey, Alexizendria Link, James McKim (November 18, 2020)

GUIDELINES FOR USING PART I AND PART II

While linear in its presentation and format, we caution against a prescriptive use of these signs and thresholds. The way in which each of us grows in our relationship with God and lives a Christian life of faith is unique. Some of us travel more direct paths while others take a more circuitous path. To avoid the potential slip to use these signs and thresholds for assessment, we offer these **guidelines of use** to the different groups that may want to use them:

General guidelines for individuals and groups:

- Much like walking a labyrinth, a life of faith is full of twists and turns.
- Enter the discernment from any of the sections. There is no prescribed order or direction.
- Take your time.
- Read each description.
- Celebrate strengths and embrace areas of growth.
- Reflect upon what the signs say about personal faith and ministry possibilities.
- Allow space for silence.
- Listen for what God is up to and where nudges are being felt.
- Journaling may be helpful.
- Talking with a spiritual director or trusted friend may be helpful.
- Recognize and celebrate a current path; consider future directions.
- Consider the questions as guides for reflection, not as assignments to complete.
- Remember, this is intended as a support, not a burden.

For **LOCAL CONGREGATIONS** guiding personal and communal discernment:

- Local discernment teams might use these signs and thresholds as well as the discernment questions with anyone in the congregation who may be interested in life direction.
- Search committees might incorporate discernment questions into their interview times.
- Some of the questions might be helpful in Identifying lay leaders in a congregation.
- Vestries/Bishop's committees might find the signs and thresholds useful as they help to identify those who may be called to ordained ministry.

For **COMMISSIONS ON MINISTRY** guiding personal discernment:

- Grid and discernment questions might be helpful in interviews.
- COM liaisons might use discernment questions with persons in the process toward ordination.
- COMs might find this useful in their work as advisors on lay ministries throughout the diocese.

PART I: SIGNS & THRESHOLDS FOR INDIVIDUALS

This document is for individuals who want to wonder, widen, and deepen your understanding of yourself and of God. You are encouraged to use these pages to identify where you feel confident and capable as well as where you feel unsure. The four thresholds—Claiming, Engaging, Sustaining, and Cultivating/Catalyzing—are offered as indicators of a maturing Christian life. They are designed to prompt reflection upon where you are in your personal faith and ministry development and suggest the knowledge, skills, and practices needed to follow Jesus at significant points in a faith journey. Together, the signs and thresholds are intended as a tool to aid discernment or self-assessment and are not an inventory for evaluation or judgment. Instead, the thresholds are simply containers that you use to get a sense of where you may be and where you may want to explore during your faith journey. The format for each of the thresholds is the same; they start with a brief description of typical characteristics of someone at this point in their faith journey and then list signs that we hope they can confidently express within the faith community and in the world. We encourage you to read each description, reflect upon what the signs say about your personal faith and ministry development, recognize your strengths, and identify where you want to grow. They are offered with blessings for the journey.

THRESHOLD I: CLAIMING

I have been baptized and am beginning to claim a new faith as I come to know God’s Story

Characteristics: curious, seeks understanding, desires affiliation and sense of belonging

Focus: Energies, primarily self-introspective, to gain grounding and become rooted in a new faith

- Who am I as a Christian?
- How do I hear and discover what being a Christian means for me?
- How do I hear and discover what being an Episcopalian means for me?

Pedagogical Stage: BLOOM’s TAXONOMY: Remembering, Understanding

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Hear and claim the Christian Story as my own.
- Know that the Bible is the foundational text of the Christian faith.

Episcopal Tradition

- Recognize that the Episcopal way values scripture, tradition, and reason as its foundation.
- Understand Episcopal identity as defined by the Book of Common Prayer (BCP), the liturgical calendar, and particularly the Baptismal Covenant.
- Participate in my faith community.
- Recognize the various roles that help make a faith community.
- Learn to pray as a means of being in relationship with God.
- Try worshipful experiences.

Theology

- Claim my belovedness in God.
- Appreciate the limits of my humanity and welcome the grace that God offers.
- Understand that baptism is the beginning of a journey, confirmation involves a personal decision to continue that journey, and the journey changes with life and as one's faith matures.
- Recognizes that Theology is the systematic study of human experience of God.
- Aware that the Baptismal Covenant, Book of Common Prayer, and scripture are foundational sources of inspiration and formation.

Representing Christ

- Wonder about the meaning of life.
- Recognize my gifts given to me by God.
- Question who I am.
- Desire a relationship with God.
- Understand prayer as a spiritual conversation.
- Seek others to share spiritual conversations.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Recognize scripture and God's story in the world.
- Hear how others make connections between My Story and God's Story.
- Curious about how scripture speaks to current circumstances and global concerns.

Episcopal Tradition

- Recognize holiness in life's patterns, practices, and rituals.
- Identify the patterns, practices and rituals that inform my living as a faithful and ethical person.
- Learn about how the Episcopal church responds to issues of social justice and stewardship.

Theology

- Recognize and explore the interrelationship between faith and other disciplines.
- Wonder how God is incarnate in all of life's big questions and the world's great challenges.
- Acknowledge the existence of evil.
- Explore turning to God in times of challenge and uncertainty.

Representing Christ

- See God in all people.
- See the world through the life and teachings of Jesus.
- Think differently about decision-making because of my faith.
- Listen and participate respectfully when various perspectives are presented respectfully.
- Recognize responsibility to vulnerable people and places.

THRESHOLD II: A STORY OF ENGAGING

I meet others who know God's Story and engage with them in communion.

Characteristics: seeking, connecting, exploring

Focus: Energies primarily oriented to engaging in community

- What gifts do I bring to the community?
- What value do I add? How/What am I contributing?
- How do my relationships help me understand God more fully?

Pedagogical Stage: BLOOM'S TAXONOMY: Applying

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Find self in the Christian Story (biblical and beyond).
- Familiar with the foundational Scriptural stories that form the story of Salvation.

Episcopal Tradition

- Appropriate scripture, tradition, and reason (with experience) to inform life and use as the basis of my theological reflection.
- Identify as an Episcopalian which includes familiarity with the Baptism, Eucharist, sacramental rites, creeds, and Book of Common Prayer (BCP).
- Understand Episcopal polity, its historic relationship with the Anglican Communion and the relation of parish, diocesan, provincial and church-wide structures.
- Understand the nature of ministry and honor different roles within the whole Body of Christ and recognize connections between church history, liturgy, ethics and social action.
- Commit to a discipline of corporate and individual prayer and worship.
- Understand the history and practice of Episcopal worship.

Theology

- Practice ways of helping others recognize and claim their belovedness.
- Confront sin in myself and in the world and recognize the power of forgiveness.
- Understand and value being a member of the body of Christ.
- Deepen relationship with God through critical engagement with scripture and traditions of Christian thought.
- The Baptismal Covenant and the Book of Common Prayer, and scripture inform my life/worldview.

Representing Christ

- Recognize the joys and obligations of Christian commitment.
- Appreciate the gifts of others.
- Engage in ongoing self-reflection about difference to understand historical inequities and suffering caused by religion and indifference.
- Participate in spiritual growth opportunities in my faith community.
- Participate in community worship, and miss it when I am absent
- Develop important relationships in my faith community.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Hear God's Story from multiple perspectives.
- Articulate how to Integrate God's Story in my life.
- Embrace the Biblical imperatives to love God and to love our neighbors as ourselves.

Episcopal Tradition

- Understand the rituals of my faith tradition as part of larger interfaith/global tradition.
- Articulate what I believe about my faith with others & what distinguishes it from other faith traditions/ denominations.
- Understand that the Episcopal Church and the Anglican Communion give public witness to contemporary challenges.

Theology

- Commit to loving God and my neighbor.
- See God's radical love in everyday life.
- Recognize my responsibility for all of God's creation.
- Acknowledge the imperative to join God's Mission for the world.

Representing Christ

- Strive to love others regardless of our differences or perceived differences.
- Engage my neighbor in response to my faith.
- Apply my faith when addressing issues.
- Participate in conversations that raise spiritual questions with people who do not share my faith tradition.
- Participate with my church to address needs in my community.

THRESHOLD III: A STORY OF SUSTAINING

I “wrestle” with God and God’s Story and share my gifts to sustain my community and God’s Mission

Characteristics: committed, consistent, confident, capable, competent, healthy questioning

Focus: Commitment to faith community – locally and/or church-wide

- What helps me go deeper?
- How can/do I deepen my faith?
- What feeds me?
- Who are my models and inspiration?

Pedagogical Stage: BLOOM’S TAXONOMY: Analyzing

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Explore my personal story, my faith community’s story and my wider community’s story in light of the Christian Story to make decisions.
- Study scripture with a working knowledge of how to interpret and use scripture in a range of different contexts.
- Lead Bible reflection confidently with a studied approach.

Episcopal Tradition

- Articulate the impact of personal faith (Apostles’ Creed), the faith of the church (Nicene Creed), and ethical questions.
- Regularly participate in and practice my faith with others an Episcopal context.
- Exercise authority to engage resources and structures of The Episcopal Church (TEC).
- Actively engage in ministerial roles in my community and missional networks beyond the local level.
- Confidently pray and talk about prayer with others.
- Actively participate in Episcopal Worship as participant and leader.

Theology

- Theologically reflect upon the structure/systems that limit our embrace of our Belovedness in God.
- Adapt my actions to honor difference (diversity) with and among cultural and religious groups.

- Articulate my sense of vocation and be able to navigate possible tension between the personal and ecclesial aspects of ministry.
- Understand the ways in which Christian beliefs and practices have developed over time and are developing in varying contexts.
- Discuss the theology of the Baptismal Covenant, the BCP and scripture and their implications for personal and corporate decision-making with others.

Representing Christ

- Live by a Rule of Life.
- Share my gifts in my faith community.
- Risk asking tough questions of my faith community at any level, especially to acknowledge difference and dismantle oppression.
- Participate in a community of practice and/or seek spiritual direction (enrichment) from a director, faith mentor or leader of faith.
- Embrace liturgical roles and lead worship.
- Embrace leadership roles within my faith community.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Make decisions informed by God's Story.
- Share the Good News utilizing theologically sound resources for biblical literacy.
- Reflect theologically on specific scriptural passages and different interpretations to choose how I respond to current events and global concerns.

Episcopal Tradition

- Participate in rituals inspired by my faith in my public community.
- Engage in dialogue about faithful living with others from different denominations/faiths.
- Represent my denomination in civic and interfaith circles.

Theology

- Point to and name God's action in the world.
- Join God in action in the world as a follower of Christ.
- Discuss the things I see as evil in my world with others.
- Engage in deeper reflections of God's mission and our role in that mission with other communities.

Representing Christ

- Intentionally seek the face of Christ in others.
- Admit my faults and seek forgiveness; I forgive.
- Strive for justice and peace as a witness of my faith.
- Connect my actions to God’s mission of love, liberation and life for all of creation.
- Share my time, talent, and financial resources sacrificially.

THRESHOLD IV: A STORY OF CULTIVATING-CATALYZING

I help others “wrestle” with God and God’s Story cultivating their faith and catalyzing their engagement in God’s Mission.

Characteristics: confident in leading, called & calling, capacity building, courageous, co-create

Focus: Cultivate OTHER’s maturing in faith and catalyze their engagement in God’s Mission

- How am I called to companion others?
- How can I invite others into discipleship?
- How can/do I pass on faith to others?
- How do I spark other’s engagement in God’s Mission?

Pedagogical Stage: BLOOM’S TAXONOMY: Evaluating, Creating

SIGNS WITHIN THE FAITH COMMUNITY (Formation)

I feel confident and competent in and am able to:

Scripture

- Facilitate others’ exploration of the connections between our Individual Stories, our collective stories, and God’s Story from multiple perspectives.
- Teach others how to engage theological resources for personal and communal reflection and response.

Episcopal Tradition

- Lead opportunities to learn about the Episcopal Way and its foundational elements and their role in life choices.
- Lead the development and implementation of ideas/ programming to incorporate growth, reflection, and continued practice that leads to deepening of Episcopal Identities.

- Encourage ministry collaborations that utilize the gifts of the laity in partnership with deacons, priests and bishops.
- Guide others' discernment of ways to use their gifts in the faith community.
- Assist others with their prayer life.
- Train liturgical leaders.

Theology

- Create opportunities to restore unity with God and others in Christ and develop processes/practices to dismantle barriers for individuals and community members to claim their belovedness in God.
- Teach the community to understand sin and grace.
- Call my faith community to deeper reflection on its role in God's Mission and mentor others in recognizing God's invitation to them as members of the Body of Christ.
- Create opportunities for community members to critically engage and systematically study our human experience of God and deepen our relationship with God.
- Teach the interconnections of history, theology, and moral decision-making based in Scripture, the Baptismal Covenant, the Book of Common Prayer.

Representing Christ

- Equip others for their discernment and gifts appreciation.
- Recognize and cultivate the gift/s of others.
- Seek ways to empower my faith community to understand historical inequities and suffering caused by religion and indifference.
- Invite and inspire others to claim their place in God's Mission.
- Prepare members for participation and leadership in worship.
- Prepare others for leadership roles.

SIGNS IN THE WORLD (Evangelization)

I feel confident and competent in and am able to:

Scripture

- Share the Christian Story while equipping others' learning and questioning.
- Equip others to share God's story in a variety of ways.
- Lead communal reflections on contemporary circumstances, issues and concerns, and facilitates communal responses to them.

Episcopal Tradition

- Create and lead rituals inspired by my faith in my public community.
- Create environments where life's questions can be engaged in faith-filled ways from lots of perspectives.
- Host gracious and brave conversations with guidelines for sharing that honor all perspectives.

Theology

- Teach others how to listen to voices from the margins and develop justice-seeking responses that address systemic injustice.
- Embrace diversities with and among cultural and religious groups.
- Risk asking and leading dialogue of unspoken questions.
- Facilitate the creation of opportunities to join God's Mission with others.

Representing Christ

- Inspire others to right relationships with God, self, others and all creation.
- Create space for healing and reconciling.
- Seek ways to empower my wider community to understand historical inequities and suffering caused by religion and indifference.
- Engage in ongoing collaboration with the wider community to speak truth to power.
- Monitor coherence between what I/we say and what I/we do.

PART II: SIGNS & THRESHOLDS FOR THOSE RESPONSIBLE FOR PASSING ON THE TEACHINGS OF THE CHURCH

PREAMBLE: Lifelong, Life-wide, and Life-deep Faith and Ministry Development for all Baptized Episcopalians¹

In the Episcopal Church, the **Baptismal Covenant** articulates the relationship God establishes with us in Holy Baptism and defines who we are as Christians and Episcopalians. It offers questions that explore how we know God: Creator, Redeemer, and Sanctifier (Father, Son, and Holy Spirit). It also highlights the work God has given us to do:

- to continue in the apostles' teaching and fellowship, in the breaking of the bread, and in the prayers;
- to resist evil and repent when we fall into sin;
- to proclaim the Good News of God in Christ through word and example;
- to seek and serve Christ in all people; and
- to strive for justice and peace and respect the dignity of every human being.²

How we each experience God, grow in faith, and discern our response to God's invitation is unique. What we share—sometimes more individually and sometimes more collectively—is a **lifelong, life-wide, and life-deep³** journey through which we develop the skills to respond to God's invitation to be the body of Christ both within our faith communities and within the world.

This document is primarily intended for members of a faith community at the local or diocesan level (such as Vestry members, Commissions on Ministry, faith formation leaders, spiritual directors, clergy, chaplains, and those responsible for passing on the teachings of the church, etc.) **who serve formally or informally as catalyzers and cultivators of other adults' faith journeys.** The document is designed to help these facilitators, guides, and/or teachers to adapt resources to local contexts in order to promote deeper faith and ministry development in a congregation, intentional community, or diocese. It is created to be a resource to generate opportunities for fellow travelers to wonder, widen, and deepen their understanding of themselves and of God as well as to gain confidence in their grasp of the

¹ This document was developed by a working group with guidance from the Task Force for Faith Formation and Ministry of the Baptized. Writing Team members include Ellen Bruckner, Kate Gillooly, Lisa Kimball, Julie Lytle, Deborah Bressoud Parker, Sharon Ely Pearson, Tina Pickering, and Melissa Rau with additional support from Amy Cook, Vicki Garvey, Alexizendria Link, and James McKim.

² The Book of Common Prayer, pp 304–305.

³ Lifelong reminds that a journey of faith unfolds chronologically across one's life. Life-wide reminds that a journey of faith integrates formative events and experiences from across one's contexts. Life-deep reminds that the meaning-making that occurs while on a journey of is influenced by culture, beliefs, attitudes, emotions, ideologies and values.

knowledge, skills, and practices needed to follow Jesus. This is not meant to be a static document but flexible; local leadership is encouraged to adapt and adjust to fit their own contexts and needs.

While designed primarily for catalyzers and cultivators of faith, it is important to be clear—faith and ministry development are the work of *all baptized people*, not just those who may consider themselves leaders or potential leaders in the church. All baptized Christians are ministers and are called to join God’s mission both in the church and in the world. Thus, individuals also may use this document as a discernment or self-assessment tool (See Part I of this document) to reflect upon where they are in their personal faith and ministry development – recognizing strengths and prompting the search for additional resources for growth in spirituality and leadership. While linear in its presentation and format, it can also be visualized as a labyrinth, entering at a certain point and following a path that has twists and turns, with new perspectives gained along the way.

To that end, this document is offered as both a **map and a set of map-making elements**. As a map, without presuming a particular entry point or sequence,⁴ the document attempts to identify recognizable signs and thresholds of one’s faith journey through a four-phased continuum. The continuum encompasses recognizable signs of maturing in our relationship with God that mark deepening knowledge and understanding, the shaping of values and attitudes, as well as the honing of practices and skills. There are also thresholds to cross as an identity as disciples and members of the Body of Christ is more fully embraced. Decisions are then made to accept increased responsibility to proclaim God’s loving, liberating, life-giving Good News (evangelism) and to help others to find their path as we pass on our faith (faith formation). These threshold crossings can be described as “movements” between four “stages” which are experienced differently by each person:⁵

- **Claiming—starting to grow in Christian faith as an Episcopal expression;**
- **Emerging—deepening individual faith through connection to a community of faith;**
- **Sustaining—engaging in faithful service, consistent spiritual practices, and participation in various aspects of life and leadership within the church and within the world; and**
- **Cultivating and Catalyzing—inspiring, supporting and passing on the faith to others on their lifelong faith journey.**⁵

⁴ New, as well as “established” Christians may find themselves traversing these thresholds during their faith journey. For example, one may be well versed in scripture (Sustaining), but lack an Episcopal lens for reading and theological reflection (Emerging). Some may be following a call to serve in the community (Cultivating/Catalyzing) long before connecting their ministry to their faith (Claiming, Emerging).

⁵ In 1956, Benjamin Bloom and four collaborators published a framework for categorizing educational goals using a cognitive progression which presumes lower order thinking is necessary to the development of higher order thinking, familiarly known as Bloom’s Taxonomy. It was revised as Bloom’s Revised Taxonomy (BRT) in 2001. The writing team used BRT and its six levels to differentiate learning outcomes in each of the four phases: Claiming includes the BRT’s remembering and understanding; Emerging concentrates on BRT’s applying; Sustaining focuses on BRT’s analyzing and evaluating; and Cultivating/Catalyzing highlights BRT’s creating.

As a set of **map-making elements** (the significant sites, potential routes, and legends for interpretation), this document highlights four areas that capture the breadth of what it means to follow Jesus within an Episcopal context:

- **Scripture,**
- **Episcopal Tradition** (including history and liturgy),
- **Theology,** and
- **Representing Christ** (including ethics and moral theology).

Together, these elements chart demonstrable competencies we express as we follow the call to discipleship more fully. They also provide a critical foundation for consistently engaging in practices of reconciliation—confronting sins that limit human dignity such as racism, sexism, ableism, and clericalism.

The authors of this document understand “competencies” as active elements that demonstrate we are growing and getting better at something throughout the course of our lives—that we are living as disciples. Beyond a transcript that outlines content with which we have engaged, competencies also describe attitudes and practices we claim as we grow through phases of faith and ministry development. We like to think of **competencies as “confidences—feelings or consciousness of one's powers.”** Each time we deepen our knowledge, sharpen our skills, embrace Christ-like attitudes and respond in faith, we show how we are gaining confidence as we strive to follow Jesus more nearly, deepen our relationship with God, and respond to God’s presence in our lives.

Background of this Document

*The Anglican Primates initiated the creation of similar maps and map-making elements in 2003 when they established a task force on Theological Education for the Anglican Communion (TEAC). TEAC’s aim is to help all Anglican Christians to be theologically alert and sensitive to the call of God. TEAC focused on an “Outcomes Based” model for education and encouraged a shift from “What does a person know?” to “What competencies does the learner need to gain in order to be able to fulfil this or that task/job/vocation?”⁶ TEAC offered a set of “ministry grids” for bishops, priests, deacons, licensed lay ministers, and lay people with the hope that each of the Anglican Communion Provinces would adapt them for local use. Within the Episcopal Church, the Association for Episcopal Deacons published competencies for diaconal formation in 2017 and updated them in 2018. The writing group offers this document, **A Christian Life of Faith: Signs and Thresholds along The Way**, for your use and adaptation.⁷*

⁶ TEAC offers more information about the philosophy of ‘Outcomes Based’ education as it applies in the context of South Africa here: <https://www.anglicannews.org/news/2006/01/teac-meeting-ends-with-pledge-to-help-renew-theological-education.aspx>. Theological Education for the Anglican Communion (TEAC), <https://www.anglicancommunion.org/theology/theological-education/ministry-grids.aspx>, January 5, 2020.

⁷ Please comment! Does this document appropriately and adequately capture the knowledge, attitudes and skills of all the baptized as we grow in faith and develop our ministries. Send comments to jlytle@bexleyseabury.edu.

A CHRISTIAN LIFE OF FAITH: SIGNS AND THRESHOLDS ALONG THE WAY

I am a baptized Christian who wonders what my journey of faith is in relationship with God, myself, my neighbor, and all of creation.

Living my faith within the faith community asks “How am I growing in faith within an expanding circle of believers?” The focus is **formation**.

Living my faith in the world asks “How am I sharing my faith beyond my faith community? The focus is **evangelization**.

THRESHOLDS	CLAIMING <i>I have been baptized and am beginning to claim a new faith as I come to know God’s Story.</i>	ENGAGING <i>I meet others who know God’s Story and engage with them in communion.</i>	SUSTAINING <i>I “wrestle” with God and God’s Story and share my gifts to sustain my community and God’s Mission.</i>	CULTIVATING-CATALYZING <i>I help others “wrestle” with God and God’s Story cultivating their faith and catalyzing their engagement in God’s Mission.</i>
Characteristics	<p>SELF-CONSCIOUS as beginning a Christian Life of Faith</p> <p>curious, seeks understanding, desires affiliation and belonging</p> <p><i>(BLOOM: remembering, Understanding)</i></p>	<p>BECOMING ACTIVE in a faith community and Engaging Faith</p> <p>seeking, connecting, exploring</p> <p><i>(BLOOM: Applying)</i></p>	<p>FAITHFUL SERVICE IN THE CHURCH locally and/or church-wide</p> <p>committed, consistent, confident, capable, healthy questioning</p> <p><i>(BLOOM: Analyzing)</i></p>	<p>OTHER-ORIENTED— responsible for teaching and passing on faith</p> <p>confident in leading, called & calling, capacity building, courageous, co-create</p> <p><i>(BLOOM: Evaluating, Creating)</i></p>
General Discernment Questions	<p>Who am I as a Christian?</p> <p>How do I hear and discover what being a Christian means for me?</p> <p>How do I hear and discover what being an Episcopalian means for me?</p>	<p>What gifts do I bring to the community?</p> <p>What value do I add? How/What am I contributing?</p> <p>How do my relationships help me understand God more fully?</p>	<p>What helps me go deeper?</p> <p>How can/do I deepen my faith?</p> <p>What feeds me?</p> <p>Who are my models and inspiration?</p>	<p>How am I called to companion others?</p> <p>How can I invite others into discipleship?</p> <p>How can/do I pass on faith to others?</p> <p>What difference can I make?</p>

DESIRED CONFIDENCE—Formation In particular KNOWLEDGE, SKILLS, ATTITUDES, BEHAVIORS				
Discernment Questions about Scripture	<p>How do I understand the Christian story for myself?</p> <p>Where is my comfort level in reading scripture for myself?</p> <p>Tell a story about a time when loving God and loving my neighbor became real.</p>	<p>Where do I find myself in the Christian story?</p> <p>What Bible stories mean the most to me?</p> <p>How do I understand the Salvation story from scripture?</p> <p>How do I make room in my religious thinking for expanding my understanding?</p>	<p>Where do I notice the Christian story affecting my life?</p> <p>How am I using Bible tools for insight and interpretation?</p> <p>How do I use scripture to support/enhance my prayer/meditation experiences?</p>	<p>Where do I notice the Christian story affecting my life?</p> <p>How am I using Bible tools for insight and interpretation?</p> <p>How do I use scripture to support/enhance my prayer/meditation experiences?</p>
Discernment Questions about Theology	<p>How do I experience my baptismal vows in my life?</p> <p>What parts of the Book of Common Prayer do I turn to in prayer and why?</p> <p>How do I understand the creeds?</p> <p>When do I find myself turning to God in prayer and silence?</p>	<p>How do I explain the importance of being part of a faith community?</p> <p>Where am I being drawn to help in caring for creation?</p> <p>How do I understand my own world view? How is faith informing how I see and understand this world view?</p> <p>How have I examined the theological statements I grew up with?</p>	<p>Where do my experiences with forgiveness fit in the scripture story?</p> <p>What kinds of confession do I find most complete and meaningful to me?</p> <p>How do I clarify and stay focused on my call amidst the many demands of my life?</p> <p>What is the examined theology/honor in my life?</p>	<p>Where in my life have I noticed a broadening/deepening of my practices of living with diversity?</p> <p>How have I challenged myself to explore the faith questions that arise in me?</p> <p>In what ways do I engage others in reflecting on their faith?</p> <p>How am I connecting with the Episcopal Church's framework Building Beloved Community?</p>

DESIRED CONFIDENCE—Formation In particular KNOWLEDGE, SKILLS, ATTITUDES, BEHAVIORS				
Discernment Questions about Episcopal Tradition	<p>Why did I choose the Episcopal Church?</p> <p>What is the element of the Episcopal Church that speaks the most to my life?</p>	<p>How is the Episcopal community important in my life?</p> <p>How am I claiming and living out my Episcopal identity?</p>	<p>What are some of the practices I've found helpful in growing my faith?</p> <p>How am I involved in my local faith community?</p> <p>What ways have I found to connect my life in my faith community with engagement in the larger neighborhood and beyond?</p> <p>How does my faith inform my civic life?</p>	<p>In what ways have I mentored others in their faith?</p> <p>How am I a role model to lead others in expressing faith in action?</p> <p>Where have I opened the space for conversation with others?</p> <p>How do I understand my leadership in my local church?</p>
Discernment Questions about Representing Christ	<p>How do I seek and serve Christ in all people, respecting the dignity of every person?</p> <p>How would I describe my relationship with God?</p> <p>What in worship feeds me for the rest of my week?</p> <p>How does my faith inform my decision-making?</p> <p>How does being part of a faith community strengthen my life?</p>	<p>How has being part of a faith community clarified and/or deepened my spiritual life?</p> <p>How does my participation in my faith community strengthen the faith community?</p> <p>How does being part of a faith community strengthen the wider communities?</p> <p>What or where are the ministries I have said "yes" to in my church?</p> <p>Who are the people I'm drawn to help outside of the church?</p> <p>What do I notice about myself when I engage with people who think and believe differently than I do?</p>	<p>How do I experience the space within my faith community for me and others to have doubts?</p> <p>How do I articulate my Rule of Life and how it developed?</p> <p>As I reflect on my participation in my faith community, where do I identify the areas of growth spiritually for myself and for my life in the wider community?</p> <p>What have I experienced as my more difficult areas of forgiveness?</p> <p>How do I experience the alignment of my actions and my beliefs?</p> <p>How do I understand myself as an agent of reconciliation in the world?</p>	<p>How do I make room for compassion and curiosity when others around me express doubts about faith? How do I respond?</p> <p>What methods/tools have I found effective in engaging others in conversations dealing with reconciliation?</p> <p>How has my faith grown as I work to empower others to use their gifts to serve the community?</p> <p>What are the actions I am taking to disrupt systemic racism in our church and the world?</p>

REPORTS TO THE 80th GENERAL CONVENTION

		CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
SCRIPTURE	Signs of Living my faith within the faith community (forming)	Hear and claim the Christian Story as my own.	Find self in the Christian Story (biblical and beyond).	Explore my personal story, my faith community's story and my wider community's story in light of the Christian Story to make decisions.	Facilitate others' exploration of the connections between Our Individual Stories, Our Collective Stories, and God's Story from multiple perspectives.
		Know that the Bible is the foundational text of the Christian faith.	Familiar with the foundational scriptural stories that form the story of Salvation.	Study the Bible with a working knowledge of how to interpret and use scripture in a range of different contexts. Confidently lead Bible reflection with a studied approach.	Teach others how to engage theological resources for personal and communal reflection and response.
		S.1	S.2	S.3	S.4
	Signs of Living my faith in the world (Evangelizing)	Recognize scripture and God's Story in the world.	Hear God's Story from multiple perspective.	Make decisions informed by God's Story.	Share the Christian Story while equipping others' learning and questioning.
		Hear how others make connections between My Story and God's Story.	Articulate how to integrate God's Story in my life.	Share the Good News utilizing theologically sound resources for biblical literacy.	Equip others to share God's Story in a variety of ways.
		Curious about how scripture speaks to current circumstances and global concerns.	Embraces the Biblical imperatives to love God and to love our neighbors as ourselves.	Reflect theologically on specific scriptural passages and different interpretations to choose how I respond to current events and global concerns.	Leads communal reflections on contemporary circumstances, issues and concerns and facilitates communal responses to them.
		S.5	S.6	S.7	S.8

		CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith within the faith community (forming)	Recognize that the Episcopal way values scripture, tradition, and reason as its foundation.	Appropriate scripture, tradition, and reason (with experience) to inform life and use as the basis of my theological reflection.	Articulate the impact of personal faith (Apostles' Creed), the faith of the church (Nicene Creed), and ethical questions.	Lead opportunities to learn about the Episcopal Way and its foundational elements and their role in life choices.	
	Understand Episcopal identity as defined by the Book of Common Prayer (BCP), the liturgical calendar, and particularly the Baptismal Covenant.	Identify as an Episcopalian which includes familiarity with the Baptism, Eucharist, sacramental rites, creeds, and Book of Common Prayer (BCP).	Regularly participate in and practice my faith with others in an Episcopal context.	Lead the development and implementation of ideas/programming to incorporate growth, reflection, and continued practice that leads to deepening of Episcopal Identities.	

REPORTS TO THE 80th GENERAL CONVENTION

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
	Participate in my faith community.	Understand Episcopal polity, its historic relationship with the Anglican Communion, and relation of parish, diocesan, provincial, and church-wide structures.	Exercise authority to engage resources and structures of The Episcopal Church (TEC).	Encourage ministry collaborations that utilize the gifts of the laity in partnership with deacons, priests and bishops.
	Recognize the various roles that help make a faith community.	Understand the nature of ministry, honor different roles within the whole Body of Christ, and recognize connections between church history, liturgy, ethics and social action.	Actively engage in ministerial roles in my community and missional networks beyond the local level.	Guide others' discernment of ways to use their gifts in the faith community.
	Learn to pray as a means of being in relationship with God.	Commit to a discipline of corporate and individual prayer and worship.	Confidently pray and talk about prayer with others.	Assist others with their prayer life.
	Try worshipful experiences.	Understand the history and practice of Episcopal worship.	Actively participate in Episcopal Worship as participant and leader.	Train liturgical leaders.
	ET.1	ET.2	ET.3	ET.4
Signs of Living my faith in the world (Evangelizing)	Recognize holiness in life's patterns, practices, and rituals.	Understand the rituals of my faith tradition as part of larger interfaith/global tradition.	Participate in rituals inspired by my faith in my public community.	Create and lead rituals inspired by my faith in my public community.
	Identify the patterns, practices and rituals that inform my living as a faithful and ethical person.	Articulate what I believe about my faith with others and what distinguishes it from other faith traditions/denominations.	Engage in dialogue about faithful living with others from different denominations/faiths.	Create environments where life's questions can be engaged in faith-filled ways from lots of perspectives.
	Learn about how the Episcopal church responds to issues of social justice and stewardship.	Understand that the Episcopal Church and the Anglican Communion give public witness to contemporary challenges.	Represent my denomination in civic and interfaith circles.	Host gracious and brave conversations with guidelines for sharing that honor all perspectives.
	ET.5	ET.6	ET.7	ET.8

REPORTS TO THE 80th GENERAL CONVENTION

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith within the faith community (forming)	Claim my belovedness in God.	Practice ways of helping others recognize and claim their belovedness.	Theologically reflect upon the structure/systems that limit our embrace of our Belovedness in God.	Create opportunities to restore unity w/God and others in Christ and develop practices to dismantle barriers for community members to claim their belovedness in God.
	Appreciate the limits of my humanity and welcome the grace that God offers.	Confront sin in myself and in the world and recognize the power of forgiveness.	Adapt my actions to honor difference/diversity with and among cultural and religious groups.	Teach the community to understand sin and grace.
	Understand baptism as a journey beginning, confirmation involves a personal decision to continue onward, and journey changes with life and faith maturity.	Understand and value being a member of the body of Christ.	Articulate my sense of vocation and able to navigate possible tension between the personal and ecclesial aspects of ministry.	Call my faith community to deeper reflection on its role in God's Mission and mentors others in recognizing God's invitation to them as members of the Body of Christ.
	Recognizes that Theology is the systematic study of human experience of God.	Deepen relationship with God through critical engagement with scripture and traditions of Christian thought.	Understand the ways in which Christian beliefs and practices have developed over time and are developing in varying contexts.	Create opportunities for community members to critically engage and systematically study our human experience of God and deepen our relationship with God.
	Aware that the Baptismal Covenant, Book of Common Prayer, and scripture are foundational sources of inspiration and formation.	The Baptismal Covenant, the Book of Common Prayer, and scripture inform my life/worldview.	Discuss the theology of the Baptismal Covenant, the BCP and scripture and their implications for personal and corporate decision-making with others.	Teach the interconnections of history, theology, and moral decision making based in scripture, the Baptismal Covenant, The Book of Common Prayer.
	T.1	T.2	T.3	T.4

REPORTS TO THE 80th GENERAL CONVENTION

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith in the world (Evangelizing)	Recognize and explore the interrelationship between faith and other disciplines.	Commit to loving God and my neighbor.	Point to and name God's action in the world.	Teach others how to listen to voices from the margins and develop justice-seeking responses that address systemic injustice.
	Wonder how God is incarnate in all of life's big questions and the world's great challenges.	See God's radical love in everyday life.	Join God in action in the world as a follower of Christ.	Embrace diversities with and among cultural and religious groups.
	Acknowledge the existence of evil.	Recognize my responsibility for all of God's creation.	Discuss the things I see as evil in my world with others.	Risk asking and leading dialogue of unspoken questions.
	Explore turning to God in times of challenge and uncertainty.	Acknowledge the imperative to join God's Mission for the world.	Engage in deeper reflections of God's mission and our role in that mission with other communities.	Facilitate the creation of opportunities to join God's Mission with others.
	T.5	T.6	T.7	T.8

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
Signs of Living my faith within the faith community (forming)	Wonder about the meaning of life.	Recognize the joys and obligations of Christian commitment.	Live by a Rule of Life.	Equip others for their discernment and gifts appreciation.
	Recognize my gifts given to me by God.	Appreciate the gifts of others.	Share my gifts in my faith community.	Recognize and cultivate the gifts of others.
	Question who I am.	Engage in ongoing self-reflection about difference to understand historical inequities and suffering caused by religion and indifference.	Risk asking tough questions of my faith community at any level, especially to acknowledge difference and dismantle oppression.	Seek ways to empower my faith community to understand historical inequities and suffering caused by religion and indifference.

REPORTS TO THE 80th GENERAL CONVENTION

	CLAIMING	ENGAGING	SUSTAINING	CULTIVATING-CATALYZING
	Desire a relationship with God.	Participate in spiritual growth opportunities in my faith community.	Participate in a community of practice and/or seek spiritual direction/enrichment with a director, faith mentor or leader.	Invite and inspire others to claim their place in God's Mission.
	Understand prayer as a spiritual conversation.	Participate in community worship, and miss it when I don't.	Embrace liturgical roles and lead worship.	Prepare members for participation and leadership in worship.
	Seek others to share spiritual conversations.	Develop important relationships in my faith community.	Embrace leadership roles within my faith community.	Prepare others for leadership roles.
	RC.1	RC.2	RC.3	RC.4
Signs of Living my faith in the world (Evangelizing)	See God in all people.	Strive to love others regardless of our differences.	Intentionally seek the face of Christ in others and celebrate their uniqueness.	Inspire others to right relationships with God, self, others and all creation.
	See the world through the life and teachings of Jesus.	Engage my neighbor in response to my faith.	Admit my faults and seek forgiveness; I forgive.	Create space for healing and reconciling.
	Think differently about decision-making because of my faith.	Apply my faith when addressing issues.	Strive for justice and peace and witness my faith.	Seek ways to empower my wider community to understand historical inequities and suffering caused by religion and indifference.
	Listen and participate respectfully when various perspectives are presented respectfully.	Participate in conversations that raise spiritual questions with people who do not share my faith tradition.	Connect my actions to God's mission of love, liberation and life for all of creation.	Engage in ongoing collaboration with the wider community to speak truth to power.
	Recognize responsibility to vulnerable people and places.	Participate with my church to address needs in my community.	Share my time, talent, and financial resources sacrificially.	Monitor coherence between what I/we say and what I/we do.
	RC.5	RC.6	RC.7	RC.8

TASK FORCE ON LITURGICAL & PRAYER BOOK REVISION

See: Volume 2, page 620

TASK FORCE ON MINISTRY WITH INDIVIDUALS WITH MENTAL ILLNESS

Membership

The Rev. Dr. David Gortner, <i>Chair</i>	Washington, III	2021
The Rt. Rev. David Bailey	Navajoland Area Mission, VIII	2021
Dr. Brandon Beck	West Texas, VII	2021
The Rev. Dr. Jeanine Driscoll	Rio Grande, VII	2021
Ms. Amanda Henes	Milwaukee, V	2021
The Rev. Dr. Robert Phillips	Washington, III	2021
The Rev. Deacon Susan Phillips	Delaware, III	2021
The Rev. John Stewart	Alabama, IV	2021
Ms. Evangeline Warren	Ohio, V	2021
Ms. Alice R. Webley	Southern Virginia, III	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

- The Rt. Rev. John Tarrant, died 8/24/2020.
- Dr. Charles Zimbrick-Rodgers, resigned due to personal reasons, returned to Philadelphia in full-time pediatric medicine 2019.
- The Rt. Rev. David Bailey, did not participate in meetings, no reason given.

Mandate

2018-C034 Ministry to People with Mental Illness and their Families

Resolved, That the 79th General Convention authorize the establishment of a Task Force on Mental Illness to further the Episcopal Church's commitment to, with and for persons with mental illness and their families as reflected in the General Convention resolution 2015-C020, as adopted and which reads:

Resolved, That the 78th General Convention of the Episcopal Church calls upon diocese, congregations, schools and other entities of The Episcopal Church to explore and adopt best practices for the vitality and increased capacity of their mission and ministry in the inclusion, support and spiritual care for persons with mental illness and their families; and be it further

Resolved, That dioceses, congregations, schools and other entities of The Episcopal Church increase understanding about mental illness by providing educational material and training; utilizing existing programs such as the National Alliance on Mental Illness, veterans groups, government departments on mental health, local organizations and other programs; and sharing the information so it is readily accessible.

And be it further;

Resolved, That this task force be appointed jointly by the Presiding Officers, with between 10 and 12 members, two or three of whom shall be bishops, two or three of whom shall be clergy, and not more than six lay persons, and all of the members shall have some professional, family or personal background with mental illness, and that this task force report back to the 80th General Convention; and be it further

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget and Finance consider a budget allocation of \$30,000 for the implementation of this resolution.

Summary of Work

The Task Force for Ministry with Individuals with Mental Illness and Their Families took up its work in its first online meeting on February 22nd, 2019. It continued its work with monthly online meetings until December, 2020. The task force gathered for an in-person working conference Sept. 29th – Oct. 2nd, 2019, at the Maritime Center in Baltimore, MD.

In the first months, the task force sought to define its scope and determine its focused work based on members' interests, passions, and insights. The following were points of sustained focus in the task force's work:

- Distinguishing mental illness from other challenges such as cognitive decline, developmental disabilities, addictions, and the ups and downs of everyday life.
- Noting how mental illness intersects with other challenges, including those above as well as profound experiences of poverty, trauma, abuse, neglect, racial injustice, and addiction in people's environment.
- Seeking to diminish and eliminate stigmatization of mental illness.
- Combating negative theological assertions about mental illness and providing more helpful theological frameworks and perspectives.

- Building informational sources to help educate the Episcopal Church about mental illness – its frequency, most common types, and its impact on personal, congregational, and community life.
- Collecting data and stories to build informational sources
- Exploring models for training people locally in effective crisis response, sustained relationship-building, and advocacy for and with people with mental illness.

From these focal points, the task force aimed to gather information, testimonies, and resources to build some on-hand informational tools and best practices for recognizing mental health challenges, providing healthy and supportive interaction, and assisting in appropriate ways that connect people to others professional and informal sources of help. The effort included assembling quick notes on signs and symptoms of some of the major mental illnesses, connecting with resource networks who work with and for people with mental illness, and seeking supportive psychological, pastoral, and theological perspectives.

The group determined to focus on producing single-page (two-sided) informational, testimonial, and resourcing fliers for each of the following topics:

- Mental Illness (a de-stigmatizing overview and introduction)
- Depression
- Anxiety Disorders
- Trauma
- Schizophrenia and Related Thought Disorders
- Bipolar Disorder

In addition, the following topics were discussed as next-level documents to produce:

- Maladaptive personality patterns
- Mental health issues related to addiction
- Eating disorders
- Obsessive-Compulsive Disorder
- Children and Teens (unique and similar dimensions of above major categories)
- Behavior Disorders in Childhood and Early Teen Years

A tertiary set of possible single-page informational documents were mentioned but not pursued as part of this task force's work – these included Attention Deficit Hyperactivity Disorder, various dementias, and other cognitive challenges.

Distilling material into single-page documents has been difficult work. Task force teams first drew together data on frequency and patterns of the most common and most frequently cited forms of

mental illness, and listed important signs and symptoms for each. They sought out biblical and theological perspectives that were affirming of the dignity of people facing mental health challenges. They invited testimonial stories of direct experience of mental illnesses in personal, familial, and congregational life. These inputs were then further distilled and tightened into the most essential and helpful pieces to contribute to a single page document for each topic. To date, five drafts have been completed, with several more underway. The task force will work with the Office of General Convention and the Episcopal Church Center to post these one-page fliers in an accessible location on the Episcopal Church website or an allied site, and will seek support to distribute these fliers by print and internet for use across the Episcopal Church.

The task force also explored and examined materials and web-based resources created by other denominations and by ecumenical and interfaith networks. Some of these resources are named in the Resolutions submitted with this report. To date, it appears that the United Church of Christ has made the strongest headway with resources of any denomination examined, with its WISE resources (Welcoming, Inclusive, Supportive, Engaged) for ministry and care with people with mental illness. There are also impressive resources and connections compiled on the Interfaith Network on Mental Illness. The U.S. Department of Health and Human Services' Office for Faith and Opportunity Initiatives developed a helpful roadmap for faith communities, titled Compassion in Action. Together, these provide some excellent starting tools for consideration in educating and training congregations and pastoral teams. The task force recommends development of an Episcopal curriculum for pastoral care and inclusive relationship drawing from these resources, during the next triennium.

The task force came to embrace both Mental Health First Aid (MHFA) and the National Alliance on Mental Illness (NAMI) as the strongest organizations and networks to help the Episcopal Church develop compassionate competency in basic understanding of mental illness, in fundamental skills for helpful and supportive interaction during times of distress, and in normalizing and humanizing relationships with people who experience challenges in mental health. The chair (the Rev. Dr. David Gortner) completed training as an MHFA trainer, in July of 2019. Several other clergy and laity in the Episcopal Church have also already been trained as trainers, including four people in the Union of Black Episcopalians. Three task force members (the Rev. Susan Phillips, the Rev. Jon Stewart, and Dr. Brandon Beck) are also members of NAMI and have noted NAMI's important role in training people in advocacy and in creating support structures for people with mental illness.

The task force is launching some pilot one-day basic MHFA* training sessions for congregations and church organizations in several dioceses and will have completed five such pilot diocesan basic training sessions before the next General Convention. Some partnership has already been fostered with NAMI to help provide some of this training in some locations.

* Please read resolution A108 and its explanation for further information on Mental Health First Aid USA (MHFA) and the reasons for recommending it. The website of Mental Health First Aid USA is at <https://www.mentalhealthfirstaid.org/>. Information on courses in Spanish is at <https://www.mentalhealthfirstaid.org/toma-un-curso/>.

Proposed resolutions

A107 Ministry with People with Mental Illness and Their Families

Resolved, the House of _____ concurring, That the 80th General Convention of The Episcopal Church recognize the worldwide prevalence of mental illness and the need for effective ministry with people facing mental health challenges, and the need to continue the work begun with the General Convention resolutions 2015-C020 and 2018-C034; and be it further

Resolved, that The Episcopal Church now equip all its people, both clergy and laity, to interact in compassionate, competent ways with those experiencing mental health challenges; and be it further

Resolved, that the provinces and dioceses of The Episcopal Church utilize resources to strengthen care, inclusion, support, and advocacy for all people (both laity and clergy) who struggle with mental health challenges; and be it further

Resolved, that the provinces and dioceses of The Episcopal Church develop and strengthen resources to support the mental health of their clergy by advocating for clergy to be intentional about their self-care, and realizing that clergy, like anyone else, may also struggle with challenges to mental health.

EXPLANATION

Even prior to the current pandemic, mental health challenges as well as mental illness have constituted significant health problems both in the US and globally. In the US, at least 1 in 4 people struggle with anxiety and 1 in 5 with depression. Globally, anxiety and depression are among the primary causes of disability. Mental health is a public health matter which impacts quality of life for people with mental health problems and their families and friends. And yet, stigmatization of mental illness has persisted, leading to shame-based and fear-based avoidance of admission and discussion of the mental health challenges that people experience.

In our baptismal vows, we promise to respect the dignity of every human person and to seek and serve Christ in all people. Through our work since the General Convention in Austin, TX, we have become convinced that it is time for The Episcopal Church to encourage its members to live more deeply into their baptismal vows. Our country is torn by divisiveness and recent FBI statistics indicate a 3% surge in hate crimes from last year. However, the hate crimes have become more violent. As mental health professionals, we know that where there is hate, there is fear, fear born from misinformation, stereotypes, and myopic interpersonal constellations. When it comes to mental health, there remains an unfortunate stigma rooted in narratives of individual strength and persistence with an insistence on ‘pulling one’s self up by her bootstraps’ as well as ‘snapping out of’ mental distress.

Individuals and families, within our communion, continue to suffer silently with the fall-out of mental illness. The existence of mental illness may not become known to pastoral care ministries in a

congregation until a terrible crisis occurs involving law enforcement and or suicide. By remaining silent about mental health issues in our congregations, we enjoin a kind of violence which harms the creatures of God, a violence of silence and separation by which clergy and congregants often distance themselves from those who suffer, out of fear, ignorance, or even apathy.

The resolutions which we are putting forth emphasize the necessity of education and training for lay leaders and clergy. Such endeavors include integrating and requiring information regarding the intersection of pastoral care and mental health into the formation process for persons discerning a call to ordained ministry, much the way Safe-church practices are required. These endeavors also call for mental health first aid training to be provided by dioceses or by provinces for lay leaders and clergy with eventual progress toward train the trainer curricula throughout the TEC.

But Jesus brings relief and release from all shame and stigma. Jesus proclaimed “I have come that you may have life and have it to the full” (John 10:10). As Emmanuel, God-with-us, Jesus communicated that God wants all humans to thrive. Jesus’ ministry was summarized in the words he read from Isaiah in the synagogue: “The Spirit of the Lord is upon me... to bring good news to the poor... to proclaim release to the captives and recovery of sight to the blind, to let the oppressed go free, to proclaim the year of the Lord’s favor” (from Luke 4:18-19).

We are calling for methodical approaches in our denomination for preparing laity and clergy to recognize and respond effectively to community members’ mental health matters. We imagine a church wide commitment in which nurturing mental health and addressing mental illness is a well-integrated component of congregational life and pastoral care. We envision programmatic education for the ministry of the baptized of all orders so that ministry embodies attention to and care for all peoples’ mental health right along with their spiritual and interpersonal well-being. We want to encourage the wider Church to endorse the importance of clergy well-being by endorsing the necessity that congregations and their lay leadership support clergy wellness via respecting boundaries, encouraging adherence to time off, and realizing that clergy also struggle with mental health issues. Now, with the additional complexities and uncertainties precipitated by the COVID pandemic, mental health matters have intensified. Anxiety and depression and substance use, common, prevalent mental health issues, are exacerbated. Tending to mental health issues will be essential to learning how to be and ‘do’ church differently.

A108 Training of trainers for Episcopal Provinces in Mental Health First Aid

Resolved, the House of _____ concurring, That the 80th General Convention authorize launch of training people in dioceses, congregations, schools, seminaries, and other entities of the Episcopal Church in the forming of caring relationships with people with mental illness and their families, in recognizing possible mental health crises and interacting in healthy and supportive ways with people in crisis, and in advocacy and bridge-building support, using the resources and training processes of Mental Health First Aid and the National Alliance on Mental Illness, as well as the Interfaith Network

on Mental Illness, WISE for Mental Health, and other helpful organizations and networks; and be it further

Resolved, that the 80th General Convention authorize and fund the training of at least 15 regional trainers in Mental Health First Aid (MHFA) for the sake of providing basic MHFA training in the Provinces of the Episcopal Church, drawing as well upon MHFA trainers who are part of the Union of Black Episcopalians along with other Episcopal MHFA trainers, with training to be completed by June, 2023, so that they will become available as resource trainers for the dioceses in each Province; and be it further

Resolved, that the 80th General Convention recommend requirement of training in Mental Health First Aid and general awareness of mental health and illness for all active clergy and lay staff in the church entities of each diocese, with issuance of certifications beginning by the next General Convention in 2024; and be it further

Resolved, that the 80th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of \$35,000 to help fund the training of the regional trainers for the Provinces.

EXPLANATION

Weakness in response to the challenges of mental illness, within the Episcopal Church as well as across community life, is directly linked to lack of awareness and of developing habits and practices for responding. The lack of awareness and healthy response is the result of avoidance of the topic altogether due to shame and stigmatization. We fail to learn what we avoid and intentionally banish from awareness.

This is a nationwide and worldwide problem that persists because of inaction. People facing challenges in mental health often remain in hiding. Others avoid approaching those facing such challenges because of uncertainty about what to do, embarrassment about raising a “touchy” subject, and fear of doing unintended harm. Still others communicate harmful ideas that blame people for the mental health challenges they are experiencing. All of this adds to a default culture of stigma, shame, and silence.

Different networks of support, training, and advocacy have emerged in the past decades. The National Alliance of Mental Illness (NAMI) began in 1979 and has spread across the U.S. with local affiliates helping build networks of support, education and advocacy for those with mental illness. Mental Health First Aid (MHFA) was first developed and created in Australia in 2001, to help people in all areas of public life to think differently about mental illness, become more aware of its frequency and impact, and become confident in effective ways to help people who are experiencing mental health distress. MHFA is now present in 24 countries and launched in 2007 in the United States. Other faith-based networks began to emerge, to help strengthen congregational and ministerial capacities for care, support, companionship, and advocacy for people with mental illness. These include the Interfaith Network on Mental Illness, the WISE for Mental Health resources of the United

Church of Christ, and the Partnership Center for Faith and Opportunity Initiatives of the U.S. Department of Health and Human Services. Each of these networks is developing tools and resources that are compassionate, affirming of dignity, and evidence-based in their helpfulness.

The Episcopal Church can benefit greatly by tapping into the resources and tools of these various networks and by forging partnerships to increase opportunities for training of its laity and clergy. After reviewing the various resources and methods of instruction, the Task Force for Ministry to Individuals with Mental Illness determined that MHFA provided solid, consistent training with resources that could become widely adopted. The Task Force supports use of all networks' training resources and tools, with MHFA leading the way in training the Episcopal Church's laity and clergy in skills for helping people who are in the midst of distress. The training helps people become skilled enough to step in and help pave the way for other professionals and supportive networks. The skills learned focus on how to approach someone experiencing distress, how to assess the situation and be particularly attentive to potential for self-harm, how to listen non-judgmentally and with care, when and what to offer as helpful information, and how to encourage someone to seek support. The training helps people understand some of the experience of mental illness and thus goes a long way to destigmatizing the realities of mental illness. The website for Mental Health First Aid USA is at <https://www.mentalhealthfirstaid.org/>. Information on courses in Spanish is at <https://www.mentalhealthfirstaid.org/toma-un-curso/>.

The Task Force on Ministry with Individuals with Mental Illness considers this MHFA training as an essential baseline of skills and habits to develop in all congregations, schools and seminaries, and other entities of the Episcopal Church. The Union of Black Episcopalians has also recognized and embraced the value of MHFA training for its leaders and congregations, and already has at least four of its members who have been certified by MHFA as trainers. These members are in Provinces II, III, and IV. Other certified Episcopal MHFA trainers are in a range of Provinces, including VII and VIII. NAMI also supports MHFA and has agreed to provide training for the Episcopal Diocese of Delaware. The Task Force is coordinating with other dioceses to pilot training, using currently certified MHFA trainers in the Episcopal Church or in NAMI.

The Resolution to train and certify Episcopal trainers across Episcopal Provinces, if affirmed, will anchor MHFA training in each Province and its dioceses. The number of new trainers to be certified will secure a minimum of two trainers per Province Number of regional trainers. In addition, Provinces are increasingly sharing resources across territories, allowing for MHFA to extend its reach to more remote areas. During the COVID-19 pandemic, MHFA pivoted to create online training possibilities. These adaptations also allow for a wider reach across regions.

MHFA training is recommended as a foundation for demystifying, destigmatizing, and naturalizing the reality of mental illness, and for helping Episcopal Church laity and clergy learn and become confident in healthy and helpful interaction with people who are experiencing distress and challenge in mental health. Next steps will include local and regional partnership and resource utilization with NAMI, INMI, WISE, and other networks.

A109 Developing Curriculum and Required Training for Clergy in Mental Health Pastoral Care

Resolved, the House of _____ concurring, That the 80th General Convention authorize the creation and launch of new curriculum to train all Episcopal ordained clergy, candidates, and postulants in mental health and mental illness awareness that emphasizes pastoral care, the forming of caring relationships, and effective advocacy. This new curriculum will incorporate and expand upon a range of resources including Mental Health First Aid, the National Alliance on Mental Illness, the Interfaith Network on Mental Illness, WISE for Mental Health, and other helpful organizations and networks; and be it further

Resolved, that all those to be ordained from January 2024 onward be trained in this new curriculum that will include training in Mental Health First Aid and in the advocacy work of the National Alliance on Mental Illness; and be it further

Resolved, that the 80th General Convention requires the training of all active priests, deacons, and bishops in this curriculum for mental health and mental illness awareness by December, 2028; and be it further

Resolved, that the 80th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of \$15,000 to support curriculum development for this training of clergy.

EXPLANATION

The explanations offered with the resolutions of the Task Force on Ministry with Individuals with Mental Illness set the stage for this Resolution. Further education and training for clergy and laity alike in the realities of mental illness in our communities and churches will lead to a demystification, destigmatization, and increased confidence in care, support, and advocacy for people experiencing challenges in mental health.

Education and training for clergy in awareness and in basic skilled response is essential, as clergy can help set the tone for care, support, and advocacy in Episcopal congregations, schools and seminaries, and other church entities. Research from prior decades has indicated that clergy often function in society as gatekeepers and gateways for people to enter into mental health care. Even in an age of declining religious affiliation, people may first come to their pastors, rabbis, imams, priests, or deacons with life concerns that carry with them matters of mental health.

However, education and training in pastoral care for clergy has not consistently given sufficient or even the most basic awareness, understanding, and development of best practices in relation to mental illness and challenges to mental health. Resources for ministerial and congregational care are available and are continuing to be developed, across denominations and faiths. However, these are not consistently incorporated into seminary- and diocesan-based education and training for deacons and priests.

General ignorance of Episcopal clergy about mental illness is not an acceptable sustained practice. General ignorance leads to avoidance of and lack of awareness of how mental health challenges can impact individuals, families, congregations, and communities. Failure by clergy to engage the topic of mental health as a part of life only serves to sustain a culture of avoidance, shame, silence, and unintended stigmatization. But clergy will not engage the topic or approach a situation of mental health distress if they are not equipped to understand, recognize, and effectively respond.

A foundation in Mental Health First Aid can provide a good introductory understanding. But, to help communities become more equipped and resourceful, to increase effectiveness in building bridges for people into helpful mental health care, and to help open healthy space for affirmative inclusion of people with mental illness in the life and mission of the Church, a fuller curriculum and set of resources for education and training of clergy needs to be developed. The aim is not to turn clergy into alternative mental health counselors. Rather, the aim is to equip clergy with sufficient knowledge and skill that they have confidence in helping to create good space and respectful boundaries for people struggling with mental illness, connecting wisely with mental health professionals and with mental health support networks, and fostering more positive cultures of response and relationship in the congregations, schools, and entities of the Episcopal Church and the communities they inhabit.

The expectation set in this Resolution makes clear that clergy education and training about mental health and mental illness will become required in the same way that training in prevention of sexual abuse and misconduct is required and anti-racism training is required. With over 25% of the population, nationally and worldwide, experiencing significant mental health challenges at any time, it is essential that clergy become more fully aware of and ready to engage with people experiencing mental health challenges, to be equipped to help Episcopal Church entities become responsive and natural in care, support, and advocacy, and to offer whole and life-affirming spiritual and theological perspectives about mental illness.

A110 Continuation and Expansion of Task Force on Ministry to Individuals with Mental Illness

Resolved, the House of _____ concurring, That the 80th General Convention continue The Task Force on Ministry to Individuals with Mental Illness, in order to aid in the direction and development and provision of resources, trainings, and curricula in pastoral and ministerial mental health care for The Episcopal Church, its provinces, dioceses, parishes, seminaries, schools, and affiliated organizations, among all of its bishops, priests, deacons, and parishioners; and be it further

Resolved, That The Task Force on Ministry with Individuals with Mental Illness be expanded to eighteen in its membership that represents a depth and range of professional, personal, familial, and

organizational experience with mental illness, in order to successfully develop and provide aforementioned resources, trainings, and curricula;

Resolved, That the Task Force on Ministry with Individuals with Mental Illness, in its expanded version in conjunction with its development of and provision of aforementioned trainings, will develop and share resources for The Episcopal Church, its various organizations, and all of its people centered on pastoral and ministerial mental health care; and be it further

Resolved, That this expanded Task Force report back on its actions to the 81st General Convention; and be it further

Resolved, That the 80th General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of \$21,700 to complete resources for churchwide distribution and use by the next triennium.

EXPLANATION

In the three-year period in which the Task Force on Ministry with Individual with Mental Illness has begun its work, the world and especially The United States experienced instability in ways that do not often occur to this degree or in this many simultaneous ways. The task force convened because mental health concerns in The Episcopal Church are finally being realized as part of our lay and ordained spiritual calling and not simply a secular psychological matter. As the three years of service for this task force come to an end, the situation of the world and country with respect to COVID-19, politics and leadership, and racism exacerbate stress, depression, anxiety and other mental health concerns for those in our churches and schools. This task force must continue as we, The Church, continue not just to observe, but to preemptively create systems through which both lay and ordained persons can seek, find, and execute healing practices around the strains of our times. The continuation and expansion of the task force will support the completion and distribution of informational resources, the implementation of trainings around the United States (and beyond) by which lay and ordained leaders can learn how to better recognize signs of mental health distress and minister to those in need of that crucial mental health care from a spiritual/religious standpoint, and the development of robust curriculum that will expand upon the trainings offered by partner organizations.

Budget

All expenses incurred for the work of this task force were tied solely to the single in-person working conference held at the Maritime Institute in Baltimore, MD, September 29th through October 2nd, 2019. These expenses were tallied and paid in full directly by the Office of General Convention. Total expenses for travel, room and board, and meeting room use was far less than the original \$30,000 that was originally marked as part of approval of Resolution C034 in 2018.

The chair of the task force (the Rev. Dr. David Gortner) was supported by Virginia Theological Seminary to enroll in and complete training as a trainer with Mental Health First Aid. These expenses included \$2,000 training tuition, \$460 air travel, \$220 car rental, and \$200 in meals and expenses not otherwise covered in the training package (lodging and food were provided by in-town family members of the chair).

Remaining expenses are already covered by the administrative and technological support provided by the Office of General Convention, and are not accounted as part of this task force's expenses.

Continuance recommendation

This task force recommends that it continue its work until the next General Convention in June, 2022. During this time, the task force will complete its written resources for print and web publication. The task force requests financial support to bring this project to closure.

The task force further recommends and urges continuation and expansion of the task force as an interim body or commission through the next triennium and beyond, to pursue and bring to fulfillment the Resolutions proposed in this report for the sake of building and ensuring competence in ministry with people with mental illness and their families.

REPORTS TO THE 80th GENERAL CONVENTION

Budget 2022-2024 if continuation is approved.

Budget Item	2022	2023	2024	Triennium Total
Task Force Meetings (Two full 3-day meetings for 18 members, or more meetings of task force subgroups)				
• Travel (\$500/person)		\$9,000	\$9,000	\$18,000
• Lodging & food (\$450/person 3 nights)		\$8,100	\$8,100	\$16,200
Mental Health First Aid Training and Certification of Trainers				
• Onsite 3-day training for 15 trainees		\$24,000		\$24,000
• Travel for 15 trainees (\$500/person -- to be paid in part through Province or diocese sponsoring trainee)		\$7,500 (minus regional contributions)		\$3,500
• Lodging & food for trainees (\$450/person – to be paid in part through Province or diocese sponsoring trainee)		\$6,750 (minus regional contributions)		\$2,500
Provincial travel support for trained trainers				
• Travel support \$250/trainer each year		\$3,750	\$3,750	\$7,500
Training manual for provincial participants -- \$25 each – paid by each participant or supporting congregation, school, or diocese				
Zoom monthly working meetings, as supported technically and administratively by the General Convention Office				
TOTAL				\$71,700

TASK FORCE ON NEW FUNDING FOR CLERGY FORMATION

Membership

The Rev. Brendan Barnicle, <i>Chair</i>	Oregon, VIII	2021
The Rt. Rev. Thomas Breidenthal, <i>Vice-Chair</i>	Southern Ohio, V	2021
Dr. Courtney V. Cowart	New York, II	2021
Mrs. Jill Heller	Milwaukee, V	2021
The Rev. Elizabeth Henry-McKeever	Arkansas, VII	2021
The Rev. Andrew Hybl	Arkansas, VII	2021
The Rev. JoAnn Jones	Pennsylvania, III	2021
The Very Rev. Cynthia Kittredge	Texas, VII	2021
Mr. James Murphy	New York, II	2021
Mr. Joseph Swimmer	Washington, III	2021
The Rt. Rev. John Harvey Taylor	Los Angeles, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-A027 New Funding for Clergy Formation

Resolved, the House of Deputies concurring, That the 79th General Convention create a task force with membership appointed by the President of the House of Deputies and the Presiding Bishop consisting of ten (10) representatives. The task force shall include, but not be limited to, representatives from local diocesan clergy formation programs, representatives from seminaries (particularly persons involved in tuition assistance programs), fund development professionals within The Episcopal Church, and representatives from organizations (such as the Society for the Increase of Ministry and United Thank Offering) that provide funds to assist persons in obtaining advanced theological education. The task force shall be made up of two (2) bishops, three (3) priests or deacons, and five (5) members of the laity. It shall develop and implement a plan to provide need-based scholarship funding to individuals pursuing theological education who are preparing to serve as priests or deacons in non-stipendiary, or part-time or bi-vocational ministries. This plan shall work

to expand the funding available to aspiring priests and deacons who are engaged in theological education other than full-time seminary education. In addition to considering other funding sources, the task force shall examine the possible use of donor-directed endowment funds held in trust by the Domestic and Foreign Missionary Society [DFMS] as a partial means to fulfill this mandate; and be it further

Resolved, That the task force shall begin on January 1, 2019, and end at the end of the 80th General Convention, unless its mandate is extended by that Convention; and be it further

Resolved, that the task force shall communicate information about any scholarship plan to members of The Episcopal Church and provide a report to the 80th General Convention; and be it further

Resolved, That the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$60,000 for the implementation of this resolution.

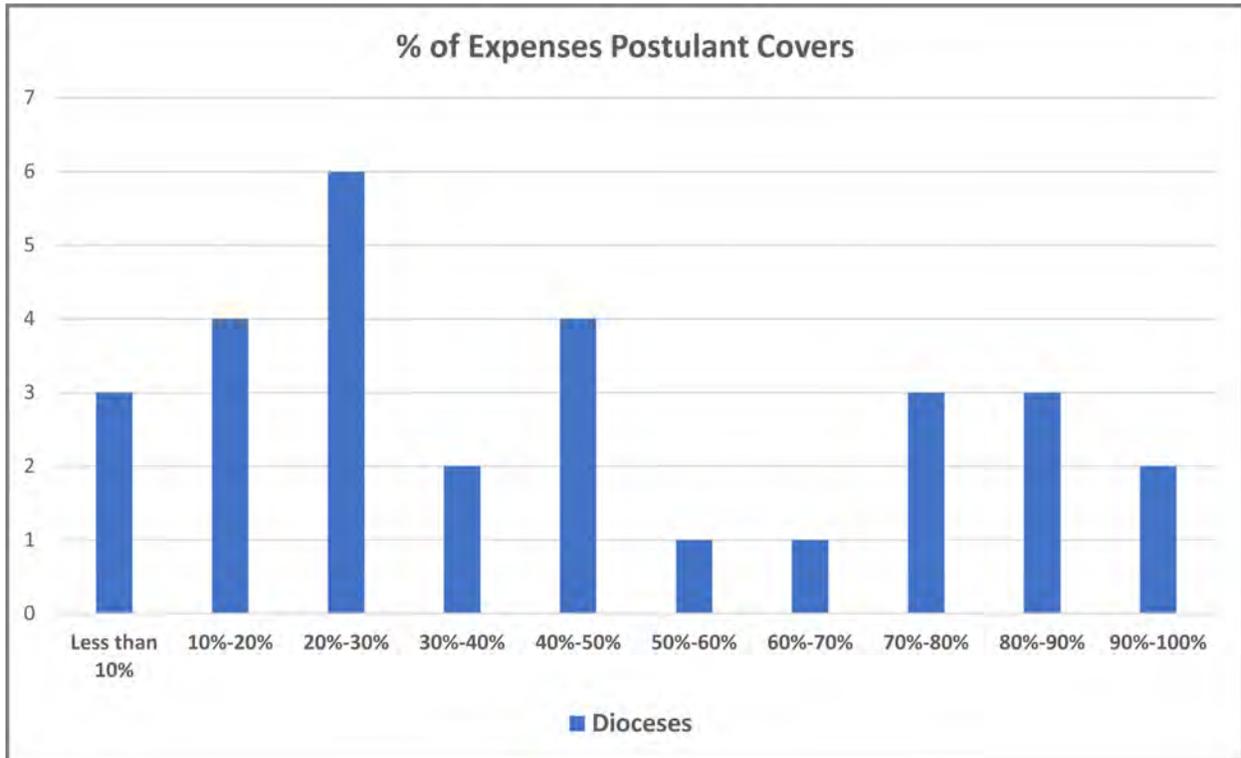
Summary of Work

The Task Force on New Funding of Clergy Formation began its work on January 30, 2019, and met again on February 25, 2019. At those initial meetings, it was clear that there was not sufficient data available to fulfill the resolutions that prompted the creation of this task force. First, it was unclear how many people are in the clergy formation process across the Episcopal Church, including people who are called to serve in part-time, non-stipendiary or bi-vocational roles. Second, it was unclear what funding is currently available for people in the formation process. Our hope was that there might be underutilized pockets of money in the Episcopal Church that could be used for clergy formation. Without existing sources of funding, the Task Force was concerned that new funding would require new fundraising, and there are already multiple fundraising demands across the Church.

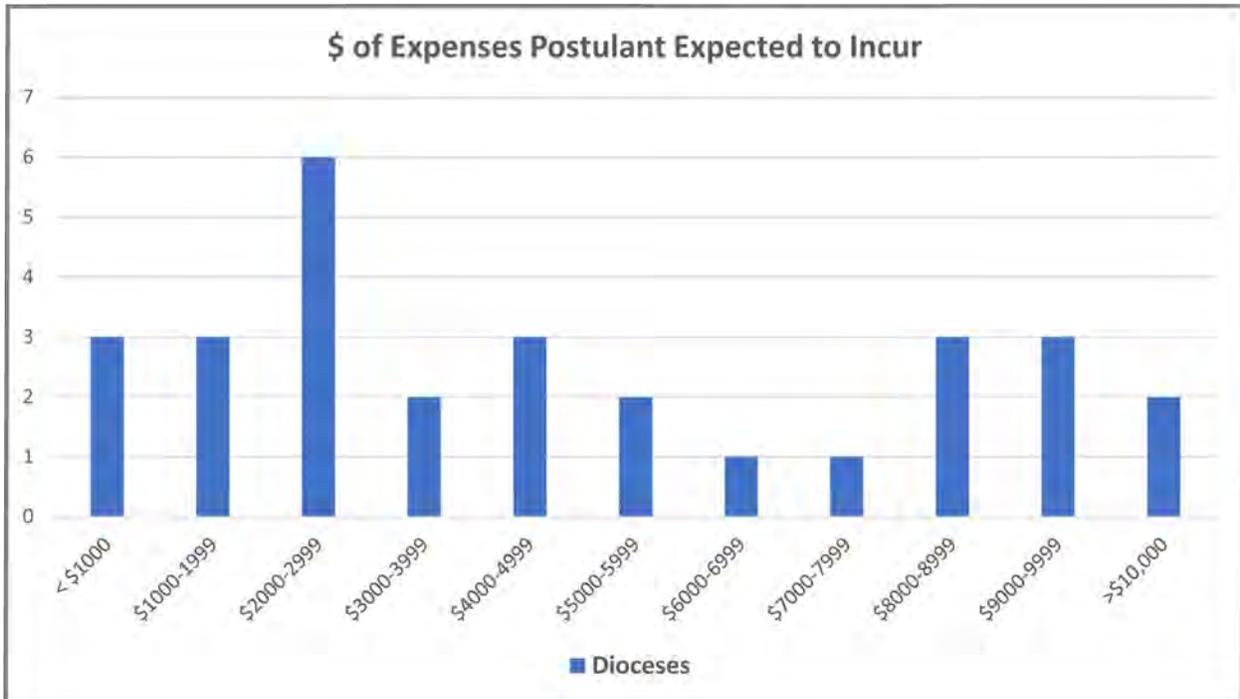
Therefore, during the April 2, 2019 meeting, the Task Force started to develop a survey that could be sent to the House of Bishops to clarify the amount of new funding that was necessary and potential sources for the funding. With the invaluable help of Brian Murray from the General Convention Office, the Task Force drafted a survey, and the survey was distributed in January of 2020. The survey closed on February 28, 2020. The survey closed just as the COVID-19 pandemic began. As a result, the Task Force did not meet again until October 2, 2020.

More importantly, the Task Force did not meet earlier because the results of the survey were inconclusive. While the results were disappointing, they also highlighted the challenges in answering the questions that the Task Force had posed to the House of Bishops. While diocese know how many postulants that they have in the formation process, the funding available to those people varies widely. 29 dioceses responded to the survey. Four dioceses clearly stated that they provide no financial assistance for people called to serve as priests or deacons in part-time, non-stipendiary or bi-vocational calls. Of those dioceses that do provide financial assistance, four dioceses fully cover all of the tuition and fees of postulants in the formation process. Four dioceses cover the cost of books. Sadly, during this time of remote learning, not a single diocese was providing funding for technology (i.e. computers and/or software) for postulants, at the time of the survey. Since the COVID-19 pandemic, those policies may have changed. Three dioceses will cover travel expenses. One diocese covers childcare and that same diocese also covers healthcare costs.

The overwhelming majority of diocese provide partial assistance for some, but not all, of the expenses of clergy formation. As a result, there is a broad range of coverage. The survey asked what percent of expenses the dioceses expected the postulant to cover personally. As the chart below demonstrates, the expectations varying dramatically.



The survey also revealed that dioceses may be underestimating the amount of money that postulants are spending for training and education. The table below shows the range of expectations.



Only three of these dioceses had local formation programs. The other diocese did not explain how they expected postulants to fund their formation. When asked about additional resources, the survey respondents pointed to seminary scholarships and Episcopal church scholarships.

As we finish our work, the Task Force on New Funding for Clergy Formation offers no resolutions, and it does not ask to continue its work. Nevertheless, the issues raised by the resolution that led to the formation of the Task Force remain as important as ever. The research from the Task Force survey paints a picture of a very fragmented approach to funding clergy formation, and it is likely to remain fragmented under the current system. This funding system raises important issues of equity, equality and church leadership. While this Task Force did not address many of these issues, it is the hope of the Task Force that the Church will continue to confront these challenges and provide access to formation for all of God's People.

TASK FORCE ON THE BUDGET PROCESS

Membership

Mr. Thomas Little, <i>Chair</i>	Vermont, I	2019
Mr. N. Kurt Barnes	New York, II	2019
The Rev. Canon Mike Ehmer	Northwest Texas, VII	2019
The Rt. Rev. Jeff Fisher	Texas, VII	2019
Ms. Sally Johnson	Minnesota, VI	2019
Ms. Nancy Koonce	Idaho, VIII	2019
Mr. Bryan Krislock	Olympia, VIII	2019
The Rt. Rev. Stephen Lane	Maine, I	2019
The Rev. Mally Ewing Lloyd	Massachusetts, I	2019
Mr. David Quittmeyer	Central Gulf Coast, IV	2019
The Hon. Rose H. Sconiers	Western New York, II	2019
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-A102 Create a Task Force on Budget Process

Resolved, That transparency throughout The Episcopal Church’s budget process, and timely participation in that process by the wider Church, are critical to the whole Church’s engagement in and support for the budget adopted by the General Convention; and be it further

Resolved, That the Treasurer of the General Convention, the Executive Council, the Joint Standing Committee on Program, Budget and Finance, and the Standing Commission on Structure, Governance, Constitution and Canons work cooperatively to examine the triennial budget process to

(a) identify ways to enhance transparency throughout the process,

(b) foster timely participation by the wider Church,

(c) clarify the respective roles of the General Convention and the Executive Council in developing the triennial budget and its funding priorities and choices, and

(d) promote effective and collaborative budgeting and management between and among all involved leadership and staff; and be it further

Resolved, That this examination conclude with a jointly prepared report published by December 31, 2019, with recommendations to the Executive Council and the 80th General Convention, including proposals for any needed revisions to the governing documents of the Church, the Executive Council and the General Convention so that the governing documents are consistent in all material respects; in preparing the report, resort to assistance from those knowledgeable about the Joint Rules of Order of the General Convention is encouraged.

Summary of Work

I. Task Force Origins

Resolution 2018-A102 directed Executive Council, the Treasurer of General Convention, the Joint Standing Committee on Program, Budget, and Finance (PB&F) and the Standing Commission on Structure, Governance, and Constitution and Canons to work cooperatively to examine the current budget process and ensure that the budget development process is transparent throughout, provides ample time for churchwide input, and that the governing documents make it clear which entity or entities are responsible for the triennial budget development, funding priorities and choices, and that the budget process promotes effective budgeting and management among all involved. To accomplish this, the Presiding Officers appointed the Task Force to undertake this work. In addition to the Resolution 2018-A102 mandate, the Task Force sought a streamlined budget process in order to conserve human and financial resources.

The Task Force members have extensive financial and budgetary experience in developing, explaining, and legislating The Episcopal Church (the Church) triennial budget. Members included the Treasurer of the General Convention (who also serves as the Treasurer of the Domestic and Foreign Missionary Society (DFMS) and as the Chief Financial Officer of the Executive Council), members of the Executive Council who serve on its Standing Committee on Finance, members of the Joint Standing Committee on Program, Budget and Finance (PB&F), members of the Standing Commission on Structure, Governance and Constitution and Canons, and longtime General Convention participants, including those familiar with Church canons and structure, as well as those who see the budget process with fresh eyes.

The Task Force and its work should be understood in the context of a continuum of discernment and dialogue over many years about how the Church develops a prudent and spirit-filled budget that stewards the resources God has given to the Church. (For more detail about the starting point and rationale for the Task Force's work, see the Report to the 79th General Convention (Blue Book Report) of the Standing Commission on Structure, Governance, Constitution & Canons at pp. 402-403.)

II. Summary of Work

A. Points of Agreement

1. There are inconsistencies in the Church's governing documents that make lines of authority and responsibility for budget development and oversight unclear, perhaps even contradictory.
2. General Convention, through its legislative process, sets the Church's priorities for mission, program, governance, and operations for the triennium. In accordance with Canons I.1.8 and I.4.6 General Convention adopts the budget for The Episcopal Church, including the formula for the assessments paid by dioceses.
3. Despite the best efforts of Executive Council and PB&F, each of which publishes a draft of the budget and solicits feedback, there is a general sense that the budget process lacks transparency and continuity.
4. The budget, in the current process, cannot fully reflect General Convention priorities since it must be finalized, published, and adopted before General Convention has completed work on resolutions that may call for funding. Carefully weighing the various options, the Task Force concluded that there are distinct advantages to finalizing the budget after General Convention to take into consideration the full range of General Convention actions and priorities for mission, program, governance, and operations.
5. Some Deputies, Bishops, and members of the wider Church are frustrated that resolutions requesting funding that, in some cases, have been worked on for the whole triennium, are not funded because they are adopted after General Convention has adopted the budget. Others are frustrated because the budget that comes to General Convention has little room for funding initiatives adopted by the General Convention. Distrust of the budget process and the budget itself may develop in these circumstances. The Task Force recommends making Executive Council's budget adjustment authority more explicit, perhaps in a Joint Rule, to address this concern, at least partially.

6. The current two-phase process, in which Executive Council, with input from the whole Church and staff, creates a draft budget and then hands it over to PB&F for revision during General Convention, consumes enormous human and financial resources as staff and others must bring PB&F members up to speed, repeating much of the work they have already done with Executive Council's finance committee and Executive Council itself. Despite their best efforts and having PB&F representatives at all of Executive Council's finance committee meetings, PB&F members often report that they do not have a full appreciation of the nuances of the budget they are tasked with modifying and presenting to General Convention. (See Appendix I for a fuller explanation of current process and its disadvantages)

7. Executive Council is the governing body of the Church between General Conventions. It is also the Board of Directors of the Domestic and Foreign Missionary Society, the Church's corporate entity. It has both canonical authority and legal responsibility as the board of the corporate entity for the financial health of the Church. As such, it makes sense that Executive Council should have complete and sole responsibility for monitoring, amending, and implementing budget changes during the triennium and to develop and approve each annual budget, giving due consideration to the priorities set by General Convention and the approved Church triennial budget into account.

8. PB&F is broadly representative of the Church, comprising one Bishop and two Deputies from each Province. Similarly, Executive Council is broadly representative of the Church as half of the members are elected by General Convention and half by the Provinces.

9. It is time to take bold action to simplify the process and to ensure that the budget reflects and supports the direction to which God is calling the whole Church.

B. Recommendations

The Task Force recommends charging Executive Council, through a standing budget committee, with responsibility for the entire creation of the Church's triennial budget and its presentation to General Convention.

General Convention's authority to amend and approve the triennial Church budget and to approve the assessment rate and formula for diocesan assessments would remain unchanged. What would change is that after General Convention the budget committee of Executive Council would review all the actions of General Convention and recommend revisions to the approved triennial budget to Executive Council so it better reflects the priorities and actions of General Convention.

In addition, the Task Force recommends that Executive Council have sole and express responsibility for revising the budget throughout the triennium. Under this recommendation, PB&F would have no

role or responsibility for any part of the budget process. Seeing as how this is PB&F's only function, we propose to discontinue PB&F. If General Convention were to disagree, the Task Force strongly believes it would be prudent to reduce the size of the 27-member PB&F to a size that would enable it to function with greater efficiency and effectiveness while holding it accountable, ensuring reasonably broad representation, and assuring financial expertise.

C. Rationale

The Task Force believes that streamlining the budget process so that one entity, broadly representative of the Church, is responsible for the whole of the budget development process will be a better use of human and financial resources with less duplication of efforts. It will also allow for clarity in communications, knowing that just one entity is responsible for information flow. And it will be easier to maintain transparency of the process and the resulting budget.

The Task Force further believes that Executive Council is the body that should be assigned responsibility for the whole of the triennial budget development process. In the Church's governance structure, Executive Council has broad canonical and fiduciary responsibilities for the fiscal health of the organization, controls, policies, and expenditures. As noted, Executive Council is broadly representative of the Church since half of Executive Council members are elected by General Convention and the other half by the Provinces.

In addition, finalizing the budget after General Convention allows for greater churchwide input into the budget, beginning with the development process and ending with all the General Convention certified resolutions. Perfecting the budget after General Convention will allow all legislation to be considered for inclusion in the budget, respecting General Convention's authority to set the Church's priorities.

Despite Executive Council's best efforts to include all of the priorities set by resolution, some of the actions adopted by General Convention may not be funded because General Convention regularly adopts resolutions with funding implications in excess of projected revenue.

III. Proposal for Improving the Budget Process

A. Prior to General Convention – Budget Creation & Transparency

Under the Task Force's proposal, Executive Council would establish a standing budget committee, with the membership defined in the Bylaws of the Executive Council, and members appointed by the Presiding Officers. Its membership could comprise two or three members of the Executive Council's finance committee, a representative from each of Executive Council's Joint Standing Committees,

the Treasurer of General Convention, the Chief Financial Officer, and others, whether or not members of Executive Council, as may be needed to ensure balanced representation and to include needed expertise.

The budget committee would maintain open communications with Executive Council and other Church governing and interim bodies. It would reach out to the wider Church, through Executive Council, about the budget preparation process and progress. It would offer a variety of specific opportunities for input and feedback.

Working with staff and with input as described above, the budget committee would develop a draft triennial budget which would be shared at least once, in draft form, with the whole Church for churchwide feedback, and would finally be reviewed and approved by Executive Council at a meeting at least three months before General Convention. As soon as possible following this Executive Council meeting, the proposed budget would be published churchwide, and again, feedback to the budget committee would be invited.

For comparison and background, all current and recent financial documents, including year-to-date figures, audit, and triennial and annual budgets, would continue to be available on the Finance Office page of episcopalchurch.org and at generalconvention.org.

B. During General Convention

General Convention sets the Church's priorities for mission, program, governance, and operations by its actions, passing resolutions which embody God's call to the Church. The Church budget is a concrete reflection of where the heart of the Church lies.

While General Convention Deputies and Bishops will have had the Executive Council's proposed budget for several months, the Executive Council, possibly through its budget committee, would present the budget to a joint session of General Convention close to the opening of General Convention, perhaps on the second or third legislative day, and would then hold at least one open hearing during General Convention to solicit reactions to and suggestions for the budget. Toward the end of General Convention, the two Houses would vote to approve the Church budget and the diocesan assessment rate and formula included in the budget, with or without amendment. Because there will be a diligent and coordinated effort after General Convention to review all adopted Resolutions for budget impacts, the Task Force believes that a review at General Convention of resolutions with budget impacts will no longer be necessary.

C. After General Convention – Budget Finalized

The budget would be subject to changes by Executive Council following General Convention based upon (a) legislative action of General Convention, (b) changes in the Church's financial circumstances, including losses or gains in revenues and/or expenses after General Convention adjourns, and (c) Executive Council's exercise of its canonical authority and fiduciary responsibilities for the budget. This would take place following General Convention and prior to the last Executive Council meeting of the calendar year in which General Convention is held. During this time, the budget committee will review the Church's adopted triennial budget considering the whole of General Convention priorities for mission, program, governance and operations as set by resolutions adopted by General Convention. It may seek input from any source, including from staff, Joint Standing Committees of Executive Council, and former budget committee members (whose expertise may be valuable). Executive Council would then finalize the upcoming annual budget.

It is important to note that, as in the past, General Convention regularly adopts resolutions with funding implications in excess of projected revenue, meaning that a number of actions adopted by General Convention may not be funded.

D. Responsibility for Budget Amendments Between General Conventions

As noted earlier, Executive Council is the governing body of the Church between General Conventions. It is also the Board of Directors of the Domestic and Foreign Missionary Society (DFMS) and thereby holds all corporate authority over the assets of the DFMS which holds all the assets of the Church. It is responsible for the fiscal health of the organization, financial controls, policies, and expenditures, etc. These dual responsibilities impose on Executive Council the ultimate oversight responsibility for the Church, its assets, budget, and operations.

The Task Force recommends that the Executive Council, both as the Board of the DFMS and as the governing body of the Church between General Conventions, using the expertise of the Treasurer, the Chief Financial Officer, the budget committee and Executive Council's finance committee, have complete and sole responsibility for monitoring and amending each triennial and annual budget between General Conventions. Executive Council would, of course, be accountable to the next General Convention for its budget adjustments.

The approved triennial and annual budgets, and any budget adjustments approved by Executive Council during the triennium, will continue to be available for public view on the episcopalchurch.org and the generalconvention.org websites.

IV. Other Governance Changes May Be Needed

The Task Force expects that there will be other Church governing body governance document changes needed to fully implement its recommendations. These include Executive Council Bylaw changes (among other things, to establish a standing budget committee); and existing references to the Joint Standing Committee on Program, Budget and Finance scattered throughout various Church documents and websites, inasmuch as PB&F is embedded in many different places, if only by reference.

V. Budget Requests and Implications

The Task Force does not foresee any material adverse budget impacts from its recommendations. The Task Force does not propose to extend its life past the current triennium.

VI. Amendments to Canons and Rules of Order; Explanations

The Task Force proposes to amend Canons I.1.2.m, I.1.2.o, I.1.8, I.1.9, I.1.11, I.1.13, I.2.6, I.2.8, I.4.3, I.4.5, I.4.6.a, I.4.6.c, I.4.6.i, I.5.5, I.9.10; House of Bishops Rule of Order V.D.d; House of Deputies Rule of Order VI.C.3.v.a and IX.A.1.ii.a.1; and Joint Rules of Order II.10, IV.14, and VII.21. Each proposed amendment, and its explanation follow.

CANONS

Canon I.1.2.m

I.1.2.m Every Commission whose Report requests expenditure out of the *budget funds* of The Episcopal Church General Convention (except for the printing of the Report) *shall include that request in its report to the General Convention and in accordance with Canon I.4.6 present to the Joint Standing Committee on Program, Budget, and Finance its written request, on or before the first business day of the session. Resolutions requiring additional expenditures shall be immediately referred to the Joint Standing Committee on Program, Budget, and Finance. No resolution involving such expenditures shall be considered unless so presented and until after report of the Joint Standing Committee on Program, Budget, and Finance.*

Explanation

If the elimination of the Joint Standing Committee on Program, Budget and Finance is adopted, then these revisions to Canon I.1.2.m provide a helpful redundancy, or reminder, to Standing Commission, together with existing Canon I.1.2.k.3.

Canon I.1.2.o

Canon I.1.2.o Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Presiding Bishop and the President of the House of Deputies, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Presiding Bishop and the President of the House of Deputies, and the composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Presiding Bishop and President of the House of Deputies and reauthorized by the Executive Council.

Explanation

The Task Force proposes to delete this canon here and move it, with small amendments, to a new Canon I.4.5. This subsection was added to the canons in 2018. It was proposed by the Standing Commission on Structure, Governance and Constitution and Canons with the following explanation: "This change permits task forces to be created and commence prior to the first meeting of Executive Council, allowing them more time in the triennium to do their work." Since the subsection calls on the Presiding Officers to review all General Convention resolutions calling for "study or further action" and to recommend to the Executive Council the bodies they believe necessary to carry out the work; and for the Executive Council to act on such recommendations, including providing funding, it makes more sense for this provision to be in the canon on the Executive Council, Canon I.4.

Canon I.1.8

I.1.8. The General Convention shall adopt, at each regular meeting, a budget for *The Episcopal Church*, including to provide for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, the necessary expenses of the President of the House of Deputies including the staff and Advisory Council required to assist in the performance of the duties and matters related to the President's office, and the applicable Church Pension Fund assessments. To defray the expense of this budget, an assessment shall be levied upon

the Dioceses of the Church in accordance with a formula which the *General Convention* shall adopt as part of this *The Episcopal Church budget Expense Budget*. It shall be the duty of each Diocesan Convention to *pay its assessment forward* to the Treasurer of the General Convention *according to the schedule established by the Executive Council annually, on the first Monday of January, the amount of the assessment levied upon that Diocese.*

Explanation

These amendments implement a generic, uniform title for the triennial budget of the Church, “The Episcopal Church budget,” and requires dioceses to pay their assessments, not all on January 1 of each year, but according to the schedule (currently monthly) established by Executive Council.

Canon I.1.9

I.1.9. The Treasurer of the General Convention shall have authority to borrow, in behalf and in the name of the *Executive Council General Convention*, such a sum as may be judged by the Treasurer to be necessary to help *pay defray* the expenses of *the Episcopal Church budget adopted under Canon I.1.8 General Convention*, with the approval of the *Presiding Bishop and the Executive Council*.

Explanation

These amendments (i) state that the Treasurer’s borrowing is on behalf of Executive Council, the governing body with authority between General Conventions; (ii) conform the title of the budget as explained above under Canon I.1.8; and (iii) clarify that any borrowing requires the approval of Executive Council, of which the Presiding Bishop, under Canon I.4.2.a, is the Chair and chief executive officer.

Canon I.1.11

I.1.11. The Treasurer shall submit to the General Convention at each regular meeting thereof a detailed budget in which the Treasurer proposes to request appropriations for the ensuing budgetary period and shall have power to expend all sums of money covered by this budget, subject to such provisions of the Canons as shall be applicable.

Explanation

The Task Force’s proposed amendments to Canon I.4.6 make clear that Executive Council would have the sole authority to propose the triennial budget to the General Convention. Accordingly, there

would be no need for the Treasurer to also propose the same budget. (Note that the remaining three sections of Canon I.1.11 will need to be renumbered.)

Canon I.1.13

I.1.13.a There shall be an Executive Office of the General Convention, to be headed by a General Convention Executive Officer to be appointed jointly by the Presiding Bishop and the President of the House of Deputies with the advice and consent of the Executive Council. The Executive Officer shall report to and serve at the pleasure of the Executive Council.

b. The Executive Office of the General Convention shall include the functions of the Secretary of the General Convention and the Treasurer of the General Convention and those of the Manager of the General Convention and, if the several positions are filled by different persons, such officers shall serve under the general supervision of the General Convention Executive Officer, who shall also coordinate the work of the Committees, Commissions, Boards and Agencies funded by ~~the~~ *The Episcopal Church General Convention Expense Budget*.

Explanation

The Task Force's proposed amendments to Canon I.4.6 make clear that Executive Council would have the sole authority to propose the triennial budget to the General Convention. Accordingly, there would be no need for the Treasurer to also propose the same budget.

Canon I.2.6

I.2.6. The stipends of the Presiding Bishop and such personal assistants as may be necessary during the Presiding Bishop's term of office for the effective performance of the duties, and the necessary expenses of that office, shall be fixed by the General Convention and shall be provided for in the budget to be submitted by the ~~Treasurer~~ *Executive Council*, as provided in the Canon I.4.6, entitled, "~~Of the General Convention.~~"

Explanation

These amendments conform Canon I.2.6 to the Task Force's other proposed canonical amendments establishing the Executive Council as the Church governing body that submits a proposed triennial budget to the General Convention, and cross-references that canon.

Canon I.2.8

I.2.8. Upon the acceptance of the Presiding Bishop's resignation for reasons of disability prior to the expiration of the term of office, the Presiding Bishop may be granted, in addition to whatever allowance may be received from The Church Pension Fund, a disability allowance to be paid by the Treasurer of the General Convention in an amount to be fixed by the ~~Joint Standing Committee on Program, Budget, and Finance~~, and ratified at the next regular meeting of the General Convention.

Explanation

Consistent with prior proposed amendments, above, this change deletes the reference to the Joint Standing Commission on Program, Budget, and Finance.

Canon I.4.3

I.4.3. Upon joint nomination of the Chair and the Vice-Chair, the Executive Council shall elect an Audit Committee of the Council and the Domestic and Foreign Missionary Society. The Committee shall be composed of six members: one from the Executive Council committee with primary responsibility for financial matters; ~~one from the Joint Standing Committee on Program, Budget, and Finance;~~ and the remaining ~~four~~ five from members of the Church-at-large having experience in general business and financial practices. The members shall serve for a term of three years beginning on January 1 following a regular meeting of the General Convention or immediately following their appointment, whichever comes later, and continue until a successor is appointed, and may serve two consecutive terms, after which a full triennium must elapse before being eligible for re-election. Annually the Audit Committee shall elect a Chair of the Committee from among its members. The Audit Committee shall regularly review the financial statements relating to all funds under the management or control of the Council and the Domestic and Foreign Missionary Society and shall report thereon at least annually to the Council.

Upon recommendation of the Audit Committee, the Executive Council shall employ on behalf of the Council and the Domestic and Foreign Missionary Society an independent Certified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. After receipt of the annual audit, the Audit Committee shall recommend to the Council and the Domestic and Foreign Missionary Society what action to take as to any matters identified in the annual audit and accompanying management letter. The responsibilities of the Audit Committee shall be set out in an Audit Committee Charter. The Audit

Committee shall review, at least annually, the Committee's Charter and recommend any changes to the Executive Council for approval.

Explanation

This amendment is consistent with the Task Force's recommendation to transfer all responsibilities of the Joint Standing Committee on Program, Budget, and Finance to the Executive Council, thereby eliminating the need for that Joint Standing Committee.

Canon I.4.4

~~Sec. 4. The Executive Council may establish by its By-laws Committees and *ad hoc* working groups or task forces, which may include or consist of non-members, to be nominated jointly by the Chair and Vice-Chair and appointed by the Council, as may be necessary to fulfill its fiduciary responsibility to the Church. All Committees and *ad hoc* working groups and task forces of Executive Council will cease to exist at the close of the next General Convention following their creation unless extended by Executive Council. Executive Council may revoke, rescind, or modify the mandate or charter of all Executive Council Committees, *ad hoc* working groups and task forces not otherwise created by Canon.~~

I.4.4 Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Chair and the Vice-Chair, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Chair and Vice-Chair, and the composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Chair and Vice-Chair and reauthorized by the Executive Council.

Explanation

As explained regarding the deletion of Canon I.1.2.0, since this canon calls on the Presiding Officers to recommend to the Executive Council the creation of various bodies to carry out the work specified by the General Convention, and for the Executive Council to allocate the funds for such work, it

makes more sense to include this provision in the canon on the Executive Council than in the canon on the General Convention. The text of subsection o was moved in its entirety with the only change being to change “Presiding Bishop” to “Chair” and “President of the House of Deputies” to “Vice-Chair,” the titles they hold in their roles in the Executive Council.

Canon I.4.6

Sec. 6

a. *At least four months prior to the next regular meeting of the General Convention, the Executive Council shall submit to the Secretary of the General Convention a proposed Episcopal Church budget for the ensuing budgetary period. The ensuing budgetary period shall comprise the calendar years starting with the January 1st following the adjournment of the most recent regular meeting of the General Convention and ending with the December 31st following the adjournment of the next regular meeting of the General Convention.* The Executive Council shall submit to the Joint Standing Committee on Program, Budget, and Finance the proposed Budget for The Episcopal Church for the ensuing budgetary period, which budgetary period shall be equal to the interval between regular meetings of the General Convention. The proposed Budget shall be submitted not less than four months before the ensuing General Convention is convened.

b. Revenue to support the Budget for The Episcopal Church shall be generated primarily by a single assessment of the Dioceses of the Church based on a formula which the General Convention shall adopt as part of its Budget process. If in any year the total anticipated income for Budget support is less than the amount required to support the Budget approved by the General Convention, the canonical portion of the Budget for The Episcopal Church shall have funding priority over any other budget areas subject to any decreases necessary to maintain a balanced Budget.

c. After the preparation of the Budget, the Treasurer shall, at least four months before the sessions of the General Convention, transmit to the Bishop of each Diocese and to the President of each Province a statement of the existing and the proposed assessments necessary to support the proposed Budget for The Episcopal Church. The Joint Standing Committee on Program, Budget, and Finance shall also submit to the General Convention, with the Budget, a plan for the assessments of the respective Dioceses of the sum needed to execute the Budget.

d.-c. There shall be joint sessions of the two Houses for the presentation of the Budget for The Episcopal Church; and thereafter consideration shall be given and appropriate action taken thereon by the General Convention.

~~e.~~d. Upon the adoption by the General Convention of a Budget for The Episcopal Church and the planned assessments for the budgetary period, the Council shall formally advise each Diocese of its share of the total assessments to support the Budget for The Episcopal Church.

~~f.~~e. Full payment of the diocesan assessment shall be required of all Dioceses, effective January 1, 2019.

~~g.~~f. Effective January 1, 2016 Council shall have the power to grant waivers from the full annual assessments of Dioceses within the limit established by the General Convention. Any diocese may appeal to Executive Council for a waiver of the assessment, in full or in part, on the basis of financial hardship, a stated plan for working toward full payment, or other reasons as agreed with the Executive Council. Effective January 1, 2019, failure to make full payment or to receive a waiver shall render the diocese ineligible to receive grants or loans from the Domestic and Foreign Missionary Society unless approved by Executive Council.

~~h.~~g. The Council shall have the power to expend all sums of money covered by the Budget and estimated Budgets approved by the General Convention, subject to such restrictions as may be imposed by the General Convention, including but not limited to the priority declaration set forth in Section 6.b of this Canon. It shall also have power to undertake such other work provided for in the Budget approved by the General Convention, or other work under the jurisdiction of the Council, the need for which may have arisen after the action of the General Convention, as in the judgment of the Council its income will warrant.

~~i.~~h. In respect of the Budget for The Episcopal Church the Executive Council shall have the power to consider and vote to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant subject to such restrictions as may be imposed by the General Convention. It shall also have power to approve other initiatives proposed by the Chair or otherwise considered by Council, ~~in consultation with the Chair of the Joint Standing Committee on Program, Budget and Finance,~~ between meetings of the General Convention, as in the judgment of the Council are prudent and which the Church revenues will be adequate to support.

~~j.~~i. Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council.

~~k.~~j. Each Diocese shall report annually to the Executive Council the name and address of each new congregation, and of each congregation closed or removed by reason of any of the following:

1. dissolution of the congregation;

2. removal of the congregation to another Diocese due to cession or retrocession of geographic territory in which the congregation is located, pursuant to Articles V.6 or VI.2 of the Constitution;
3. removal of the congregation to a new physical location or address, identifying both the location or address from which the congregation has removed, and the successor location or address; and
4. merger of the congregation into one or more other congregations, in which case, the Diocese shall include in its report the names of all congregations involved in the merger, and the physical location and address at which the merged congregations shall be located.

Explanation

These amendments further implement the Task Force's recommendation to have the Executive Council submit the proposed triennial budget to the General Convention, specifically to the Secretary of the General Convention. The changes also delete a redundant subsection requiring the Treasurer to also submit the proposed budget, and clarifies that the budget operates on a calendar year. The amendments strike current subsection c; for many years, once released the proposed budget has been distributed to the entire Church, making it unnecessary to direct Executive Council to send it to all Bishops and Provinces. Finally, the mention in subsection i of the Joint Standing Committee on Program, Budget and Finance should be struck.

Canon I.4.7

Sec. 7

- a. Every Missionary Bishop or, in case of a vacancy, the Bishop in charge of the jurisdiction, receiving aid from ~~the General Convention Budget~~ *The Episcopal Church budget*, shall report at the close of each fiscal year to the Council, giving account of work performed, of money received from all sources and disbursed for all purposes, and of the state of the Church in the jurisdiction at the date of such report, all in such form as the Council may prescribe.
- b. The Ecclesiastical Authority of every Diocese receiving aid from the General Convention Budget shall report at the close of each fiscal year to the Council, giving account of the work in the diocese supported in whole or in part by that aid.

Explanation

This amendment implement a generic, uniform title for the triennial budget of the Church, “The Episcopal Church budget.”

Canon I.5.5

~~I.5.5. The expenses of the Archives of The Episcopal Church shall be shared by included in the General Convention the budget for The Episcopal Church and the Executive Council.~~

Explanation

The Task Force concluded that the concept of sharing the Archives’ expenses between the General Convention and the Executive Council is outdated. The triennial budget makes an appropriation for the Archives, and the canon need not mention any sharing of expenses., as there is no difference between the "Executive Council budget" and the "General Convention budget." The Task Force's recommendation is to use throughout the canons and Rules of order the term, The Episcopal Church budget.

Canon I.9.10

~~I.9.10. The Synod of a Province may take over from the Executive Council, with its consent, and during its pleasure, the administration of any given work within the Province. If the Province shall provide the funds for such work, the constituent Dioceses then members of, and supporting, such Province shall receive proportional credit therefor upon the quotas assigned to them for the support of the Program of the Church, provided that the total amount of such credits shall not exceed the sum appropriated in the budget of the Executive Council for the maintenance of the work so taken over.~~

Explanation

This canon was adopted in 1928 and has been little used, according to the Annotated Constitution and Canons (White & Dykman). A Province that sought to take over the implementation of a General Convention-funded program could propose a plan for that to the Executive Council, which could take action to support the request, on a case by case basis with full access to the facts. The Task Force believes this canon is no longer needed and in addition seems arcane.

RULES OF ORDER

House of Bishops Rules of Order

Note: Under House of Bishops Rule of Order V.O.2, those Rules of Order may only be amended by the House of Bishops – not by the General Convention. The Task Force, and the Bishops serving on it, recommend that the House of Bishops amend its Rule of Order V.D.d as follows.

House of Bishops Rule of Order V.D.d

V.D.d. Before final consideration by the House, the Joint Standing Committee on Program, Budget, and Finance (PB&F) shall have been informed by the Committee considering any proposed action which, if adopted by General Convention, would require an appropriation of funds and PB&F shall have acknowledged receipt of such information by endorsement on the committee report or by other appropriate means. Implementation of any such resolution is subject to funding in the budget.

Explanation

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this Rule of Order is no longer necessary.

House of Bishops Rule VIII.I

I. Whenever the House shall make a determination under Article I.2 of the Constitution that a resigned Bishop shall or shall not retain a seat and vote in the House, the following understanding of the intent of the pertinent terms of that provision of the Constitution shall apply:

1. "advanced age" shall mean at least 62 years of age;
2. "bodily infirmity" shall mean either a condition for which one is eligible for disability retirement benefits from the Church Pension Fund or Social Security Administration, or a physical or mental impairment that a physician or psychiatrist (approved by the Presiding Bishop) certifies would likely result in eligibility for such disability retirement benefits should the Bishop continue in active episcopal ministry;
3. "office created by the General Convention" shall mean a ministry funded by ~~the General Convention Budget~~ *The Episcopal Church budget* and approved by the Presiding Bishop; and
4. "mission strategy" shall mean a strategy that would allow the election of an indigenous member of the clergy of a non-domestic diocese as Bishop, or that would allow a diocese to implement a new mission strategy as determined by the Presiding Bishop, or that would allow

a transition in episcopal leadership after a Diocesan Bishop or Bishop Suffragan has served 10 or more years in either or both of those offices.

Explanation

This amendment implements a generic, uniform title for the triennial budget of the Church, “The Episcopal Church budget.”

House of Deputies Rules of Order

Note: Under House of Deputies XIX.A, those Rules of Order may only be amended by the House of Deputies – not by the General Convention. The Task Force, and the Deputies serving on it, recommend that the House of Deputies amend its Rules of Order VI.C.3.v.a and IX.A.1.ii.a.1, as follows.

House of Deputies Rule of Order VI.C.3.v.a

3. Placing items on the Consent Calendar. Every Committee Reports on Resolutions or other matters will be placed on the Consent Calendar automatically unless:

- i. the committee votes to exclude it from the Consent Calendar;
- ii. it is removed in accordance with these Rules;
- iii. the Rules of Order, the Joint Rules of Order, the Canons, or the Constitution require a different procedure for considering the item;
- iv. the item has been set by a Special Order of Business; or
- v. the item is one of the following:
 - ~~a.~~ a report from the Joint Standing Committee on Program, Budget and Finance;
 - ~~b.~~ a. an election;
 - ~~c.~~ b. a Resolution of privilege or courtesy;
 - ~~d.~~ c. the confirmation of the election of the Presiding Bishop.

Explanation

With the Task Force’s proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council’s post-General Convention role of finalizing the budget, this House of Deputies Rule of Order is no longer necessary.

House of Deputies Rule of Order IX.A.1.ii.a.1

A. General Rules on Other Committees

1. Appointment and Creation

- i. The President may designate other Committees for the work of the House of Deputies at General Convention no later than 90 days before the first legislative day of General Convention except that Conference Committees will be appointed during General Convention as needed.
- ii. The Committees may include the following and any others that the President designates:
 - a. Resolution Review
 1. The Resolution Review Committee will review all Resolutions submitted prior to General Convention to review that they are consistent with the polity of this Church, and that they are in the form required by the Canons, and to assess whether they have funding implications.

Explanation

This Resolution Review Committee “budget impact” task will no longer be necessary under the structure and sequencing of the Task Force’s recommendations.

Joint Rules of Order

Pursuant to Joint Rule of Order X.25, the Task Force Recommends that the Joint Rules of Order be amended as follows.

Joint Rule of Order II.10

II: Joint Standing Committee on Program, Budget, and Finance

10.

~~a. There shall be a Joint Standing Committee on Program, Budget, and Finance, consisting of 27 persons being members of the General Convention (one Bishop, and two members of the House of Deputies, either Lay or Clerical, from each Province), who shall be appointed not later than the fifteenth day of December following each regular Meeting of the General Convention, the Bishops to be appointed by the Presiding Bishop, the Deputies by the President of the House of Deputies.~~

The Secretary of the General Convention and the Treasurer of the General Convention and the Chief Financial Officer of the Executive Council shall be members *ex officio*, without vote.

The Joint Standing Committee may appoint advisers, from time to time, as its funds warrant, to assist the Joint Standing Committee with its work.

b. Organization. The Joint Standing Committee shall elect its Chair from its membership, and such other officers as needed.

The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the Budget, as well as Sections on Funding and Presentation, the size and composition of the several Sections to be determined by the Joint Standing Committee.

The Chairs of each Section shall be elected by the Joint Standing Committee; the several Sections shall elect their own Secretaries from among their own membership.

The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; *provided, however,* that final action on Budget shall be taken only by the full Committee, either in meeting assembled or by a vote by mail.

c. During the interim between regular Meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose.

Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof.

In respect of the Budget for The Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by mail, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention.

With regard to the General Church Program, the Joint Standing Committee shall:

- i. Meet and consult with the Executive Council, or its Administration and Finance Committee, on adjustments to the program priorities, and on alternate income generating resources;

ii. Receive from the Executive Council, not less than four months prior to the meeting of General Convention, the proposed General Church Program for the upcoming triennium, including a proposed detailed Budget for the year next following that of such Convention;

iii. Meet in such places as it shall determine, sufficiently in advance of the next General Convention to expedite its work;

iv. Conduct hearings upon such proposed Program and Budget; and

v. Consider such proposed Program and Budget and report thereon to the next succeeding General Convention.

d. Not later than the third day prior to the adjournment of each regular meeting of the General Convention, the Joint Standing Committee shall report to a Joint Session, pursuant to Canon, a proposed Budget for The Episcopal Church for the ensuing Convention period, subject to the approval of the said Budgets subject also to increase, reduction, or elimination of items, based on open hearings held during the General Convention and by subsequent concurrent action by the House of Deputies and the House of Bishops.

Subsequent sections would be renumbered.

Explanation

With the Task Force's proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council's post-General Convention role of finalizing the budget, this Joint Rule of Order is no longer necessary. (Note that the deletion of this Joint Rule of Order will require the succeeding Joint Rules of Order to be renumbered.)

Joint Rule of Order IV.14

IV: Supplemental Money Bills

14. After the adoption of the Budget for The Episcopal Church, any resolution calling for the expenditure of any moneys (or containing implied funding) shall be unfunded.

Subsequent sections V - X should be renumbered.

Explanation

The Task Force proposes to change the budgeting process for the triennial Episcopal Church budget so that after General Convention a budget committee of the Executive Council will review all resolutions adopted by the General Convention, especially those with budget implications and those setting the priorities for the Church, and make recommendations to the Executive Council for appropriate revisions of the budget adopted by the General Convention. Therefore, it would no longer be the case that resolutions adopted after adoption of the triennial budget would never be funded. In fact, such resolutions could be funded by Executive Council after it completes its post-General Convention review of all adopted resolutions to see if they should be funded by the triennial budget finalized by the Executive Council.

Joint Rule of Order VII.21

VII.21.

a. The Joint Standing Committee on Nominations, through the Office of the Secretary of General Convention, will secure background checks on its and any other nominees for Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund. These background checks will cover criminal records checks and sexual offense, registry checks in any state where a proposed nominee has resided during the prior seven (7) years, any appropriate professional licensing bodies with jurisdiction over a nominee's professional status and any violations of state or federal securities or banking laws. The records checks of proposed nominees from outside the United States will cover the same information from comparable authorities in the place of principal residence of the proposed nominee.

- b.** The required background check will be done prior to accepting a proposed nomination.
- c.** Background check results will be reviewed by the Office of the Secretary of General Convention. If that Office, after consultation with the Chief Legal Officer, determines that the results should preclude a person from holding the office sought, the Office shall share the determination with the proposed nominee and remit that determination, but not the background check results, to the nominating authority. Background check information shall not be shared beyond the Office of the Secretary of General Convention, the Chief Legal Officer, and proposed nominees who request their own information. The cost of background checks under this rule shall be covered by ~~the General Convention~~ *The Episcopal Church* budget.

Explanation

This is another amendment conforming the title of the budget to “The Episcopal Church” budget.

Proposed resolutions

A048 Amend Canons and Rules of Order to Implement the Recommendations of the Task Force on The Budget Process

Resolved, the House of ____ concurring, That Canons I.1.2.m, I.1.2.o, I.1.8, I.1.9, I.1.11, I.1.13, I.2.6, I.2.8, I.4.3, I.4.5, I.4.6.a, I.4.6.c, I.4.6.i, I.5.5, I.9.10; House of Bishops Rule of Order V.D.d and VIII.l; House of Deputies Rule of Order VI.C.3.v.a and IX.A.1.ii.a.1; and Joint Rules of Order II.10, IV.14, and VII.21, be amended as follows:

CANONS

Canon I.1.2.m

m. Every Commission whose Report requests expenditure out of the *budget funds* of The Episcopal Church General Convention (except for the printing of the Report) shall *include that request in its report to the General Convention and in accordance with Canon I-2-3 present to the Joint Standing Committee on Program, Budget, and Finance its written request, on or before the 6st business day of the session.* Resolutions requiring additional expenditures shall be immediately referred to the Joint Standing Committee on Program, Budget, and Finance. No resolution involving such expenditures shall be considered unless so presented and until after report of the Joint Standing Committee on Program, Budget, and Finance.

Canon I.1.2.o

o. Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Presiding Bishop and the President of the House of Deputies, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Presiding Bishop and the President of the House of Deputies, and the composition of such committees and task forces - "all reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Presiding Bishop and President of the House of Deputies and reauthorized by the Executive Council.

Canon I.1.8

Sec. 8. The General Convention shall adopt, at each regular meeting, a budget for The Episcopal Church, including to provide for the contingent expenses of the General Convention, the stipend of the Presiding Bishop together with the necessary expenses of that office, the necessary expenses of

the President of the House of Deputies including the staff and Advisory Council required to assist in the performance of the duties and matters related to the President's office, and the applicable Church Pension Fund assessments. To defray the expense of this budget, an assessment shall be levied upon the Dioceses of the Church in accordance with a formula which the General Convention shall adopt as part of this *The Episcopal Church budget Expense Budget*. It shall be the duty of each Diocesan Convention to *pay its assessment forward to the Treasurer of the General Convention according to the schedule established by the Executive Council annually, on the first Monday of January, the amount of the assessment levied upon that Diocese.*

Canon I.1.9

Sec. 9. The Treasurer of the General Convention shall have authority to borrow, in behalf and in the name of the *Executive Council General Convention*, such a sum as may be judged by the Treasurer to be necessary to help *pay defray* the expenses of *the Episcopal Church budget adopted under Canon I.1.8 General Convention*, with the approval of the Presiding Bishop and the Executive Council.

Canon I.1.11

Sec. 11. *The Treasurer shall submit to the General Convention at each regular meeting thereof a detailed budget in which the Treasurer proposes to request appropriations for the ensuing budgetary period and shall have power to expend all sums of money covered by this budget, subject to such provisions of the Canons as shall be applicable.*

Canon I.1.13

Sec. 13.

- a. There shall be an Executive Office of the General Convention, to be headed by a General Convention Executive Officer to be appointed jointly by the Presiding Bishop and the President of the House of Deputies with the advice and consent of the Executive Council. The Executive Officer shall report to and serve at the pleasure of the Executive Council.
- b. The Executive Office of the General Convention shall include the functions of the Secretary of the General Convention and the Treasurer of the General Convention and those of the Manager of the General Convention and, if the several positions are filled by different persons, such officers shall serve under the general supervision of the General Convention Executive Officer, who shall also coordinate the work of the Committees, Commissions, Boards and Agencies funded by *the Episcopal Church General Convention Expense Budget*.

Canon I.2.6

Sec. 6. The stipends of the Presiding Bishop and such personal assistants as may be necessary during the Presiding Bishop's term of office for the effective performance of the duties, and the necessary expenses of that office, shall be fixed by the General Convention and shall be provided for in the budget to be submitted by the *Treasurer Executive Council*, as provided in the Canon I.4.6, entitled, "*Of the General Convention.*"

Canon I.2.8

Sec. 8. Upon the acceptance of the Presiding Bishop's resignation for reasons of disability prior to the expiration of the term of office, the Presiding Bishop may be granted, in addition to whatever allowance may be received from The Church Pension Fund, a disability allowance to be paid by the Treasurer of the General Convention in an amount to be fixed by the ~~Executive Council~~ Joint Standing Committee on Program, Budget, and Finance, and ratified at the next regular meeting of the General Convention.

Canon I.4.3

Sec. 3. Upon joint nomination of the Chair and the Vice-Chair, the Executive Council shall elect an Audit Committee of the Council and the Domestic and Foreign Missionary Society. The Committee shall be composed of six members: one from the Executive Council committee with primary responsibility for financial matters; ~~one from the Joint Standing Committee on Program, Budget, and Finance;~~ and the remaining ~~four~~ five from members of the Church-at-large having experience in general business and financial practices. The members shall serve for a term of three years beginning on January 1 following a regular meeting of the General Convention or immediately following their appointment, whichever comes later, and continue until a successor is appointed, and may serve two consecutive terms, after which a full triennium must elapse before being eligible for re-election. Annually the Audit Committee shall elect a Chair of the Committee from among its members. The Audit Committee shall regularly review the financial statements relating to all funds under the management or control of the Council and the Domestic and Foreign Missionary Society and shall report thereon at least annually to the Council.

Upon recommendation of the Audit Committee, the Executive Council shall employ on behalf of the Council and the Domestic and Foreign Missionary Society an independent Certified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. After receipt of the annual audit, the Audit Committee shall recommend to the Council and the Domestic and Foreign Missionary Society what action to take as to any matters identified in the annual audit and accompanying management letter. The responsibilities of the Audit Committee shall be set out in an Audit Committee Charter. The Audit Committee shall review, at least annually, the Committee's Charter and recommend any changes to the Executive Council for approval.

Canon I.4.4

Sec. 4. ~~The Executive Council may establish by its By-laws Committees and ad hoc working groups or task forces, which may include or consist of non-members, to be nominated jointly by the Chair and Vice-Chair and appointed by the Council, as may be necessary to fulfill its fiduciary responsibility to the Church. All Committees and ad hoc working groups and task forces of Executive Council will cease to exist at the close of the next General Convention following their creation unless extended by Executive Council. Executive Council may revoke, rescind, or modify the mandate or charter of all Executive Council Committees, ad hoc working groups and task forces not otherwise created by Canon.~~

Following the adjournment of a General Convention, and subject to budgeted funds available for the purpose, the Chair and the Vice-Chair, having reviewed the resolutions adopted by the General Convention that provide for any study or further action, shall thereupon recommend to the Executive

Council, the creation of such study committees and task forces as may be necessary to complete that work. Any Executive Council resolution creating a task force or study committee shall specify the size and composition, the clear and express duties assigned, the time for completion of the work assigned, to whom the body's report is to be made, and the amount and source of the funding for the body. The members of each such body shall be jointly appointed by the Chair and Vice-Chair, and the composition of such committees and task forces shall reflect the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. Those committees and task forces so appointed shall expire at the beginning of the next General Convention following, unless reappointed by the Chair and Vice-Chair and reauthorized by the Executive Council.

Canon I.4.6

Sec. 6

a. *At least four months prior to the next regular meeting of the General Convention, the Executive Council shall submit to the Secretary of the General Convention a proposed Episcopal Church budget for the ensuing budgetary period. The ensuing budgetary period shall comprise the calendar years starting with the January 1st following the adjournment of the most recent regular meeting of the General Convention and ending with the December 31st following the adjournment of the next regular meeting of the General Convention. The Executive Council shall submit to the Joint Standing Committee on Program, Budget, and Finance the proposed Budget for The Episcopal Church for the ensuing budgetary period, which budgetary period shall be equal to the interval between regular meetings of the General Convention. The proposed Budget shall be submitted not less than four months before the ensuing General Convention is convened.*

b. Revenue to support the Budget for The Episcopal Church shall be generated primarily by a single assessment of the Dioceses of the Church based on a formula which the General Convention shall adopt as part of its Budget process. If in any year the total anticipated income for Budget support is less than the amount required to support the Budget approved by the General Convention, the canonical portion of the Budget for The Episcopal Church shall have funding priority over any other budget areas subject to any decreases necessary to maintain a balanced Budget.

c. *After the preparation of the Budget, the Treasurer shall, at least four months before the sessions of the General Convention, transmit to the Bishop of each Diocese and to the President of each Province a statement of the existing and the proposed assessments necessary to support the proposed Budget for The Episcopal Church. The Joint Standing Committee on Program, Budget, and Finance shall also submit to the General Convention, with the Budget, a plan for the assessments of the respective Dioceses of the sum needed to execute the Budget.*

d.c. There shall be joint sessions of the two Houses for the presentation of the Budget for The Episcopal Church; and thereafter consideration shall be given and appropriate action taken thereon by the General Convention.

e.d. Upon the adoption by the General Convention of a Budget for The Episcopal Church and the planned assessments for the budgetary period, the Council shall formally advise each Diocese of its share of the total assessments to support the Budget for The Episcopal Church.

f.e. Full payment of the diocesan assessment shall be required of all Dioceses, effective January 1, 2019.

g.f. Effective January 1, 2016 Council shall have the power to grant waivers from the full annual assessments of Dioceses within the limit established by the General Convention. Any diocese may appeal to Executive Council for a waiver of the assessment, in full or in part, on the basis of financial hardship, a stated plan for working toward full payment, or other reasons as agreed with the Executive Council. Effective January 1, 2019, failure to make full payment or to receive a waiver shall render the diocese ineligible to receive grants or loans from the Domestic and Foreign Missionary Society unless approved by Executive Council.

h.g. The Council shall have the power to expend all sums of money covered by the Budget and estimated Budgets approved by the General Convention, subject to such restrictions as may be imposed by the General Convention, including but not limited to the priority declaration set forth in Section 6.b of this Canon. It shall also have power to undertake such other work provided for in the Budget approved by the General Convention, or other work under the jurisdiction of the Council, the need for which may have arisen after the action of the General Convention, as in the judgment of the Council its income will warrant.

i.h. In respect of the Budget for The Episcopal Church the Executive Council shall have the power to consider and vote to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant subject to such restrictions as may be imposed by the General Convention. It shall also have power to approve other initiatives proposed by the Chair or otherwise considered by Council, ~~in consultation with the Chair of the Joint Standing Committee on Program, Budget and Finance,~~ between meetings of the General Convention, as in the judgment of the Council are prudent and which the Church revenues will be adequate to support.

j.i. Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council.

k.j. Each Diocese shall report annually to the Executive Council the name and address of each new congregation, and of each congregation closed or removed by reason of any of the following:

1. dissolution of the congregation;
2. removal of the congregation to another Diocese due to cession or retrocession of geographic territory in which the congregation is located, pursuant to Articles V.6 or VI.2 of the Constitution;
3. removal of the congregation to a new physical location or address, identifying both the location or address from which the congregation has removed, and the successor location or address; and
4. merger of the congregation into one or more other congregations, in which case, the Diocese shall include in its report the names of all congregations involved in the merger, and the physical location and address at which the merged congregations shall be located.

Canon I.5.5

Sec. 5. The expenses of the Archives of The Episcopal Church shall be ~~shared by~~ *included in the General Convention the budget for The Episcopal Church and the Executive Council.*

Canon I.9.10

Sec. 10. The Synod of a Province may take over from the Executive Council, with its consent, and during its pleasure, the administration of any given work within the Province. If the Province shall provide the funds for such work, the constituent Dioceses then members of, and supporting, such Province shall receive proportional credit therefor upon the quotas assigned to them for the support of the Program of the Church, provided that the total amount of such credits shall not exceed the sum appropriated in the budget of the Executive Council for the maintenance of the work so taken over.

RULES OF ORDER

House of Bishops Rules of Order

Note: Under House of Bishops Rule of Order V.O.2, those Rules of Order may only be amended by the House of Bishops – not by the General Convention. The Task Force, and the Bishops serving on it, recommend that the House of Bishops amend its Rule of Order V.D.d as follows.

House of Bishops Rule of Order V.D.d

d. Before final consideration by the House, the Joint Standing Committee on Program, Budget, and Finance (PB&F) shall have been informed by the Committee considering any proposed action which, if adopted by General Convention, would require an appropriation of funds and PB&F shall have acknowledged receipt of such information by endorsement on the committee report or by other appropriate means. Implementation of any such resolution is subject to funding in the budget.

House of Bishops Rule VIII.I

I. Whenever the House shall make a determination under Article I.2 of the Constitution that a resigned Bishop shall or shall not retain a seat and vote in the House, the following understanding of the intent of the pertinent terms of that provision of the Constitution shall apply:

1. “advanced age” shall mean at least 62 years of age;
2. “bodily infirmity” shall mean either a condition for which one is eligible for disability retirement benefits from the Church Pension Fund or Social Security Administration, or a physical or mental impairment that a physician or psychiatrist (approved by the Presiding Bishop) certifies would likely result in eligibility for such disability retirement benefits should the Bishop continue in active episcopal ministry;
3. “office created by the General Convention” shall mean a ministry funded by the General Convention Budget ~~The Episcopal Church budget~~ and approved by the Presiding Bishop; and
4. “mission strategy” shall mean a strategy that would allow the election of an indigenous member of the clergy of a non-domestic diocese as Bishop, or that would allow a diocese to

implement a new mission strategy as determined by the Presiding Bishop, or that would allow a transition in episcopal leadership after a Diocesan Bishop or Bishop Suffragan has served 10 or more years in either or both of those offices.

House of Deputies Rules of Order

Note: Under House of Deputies XIX.A, those Rules of Order may only be amended by the House of Deputies – not by the General Convention. The Task Force, and the Deputies serving on it, recommend that the House of Deputies amend its Rules of Order VI.C.3.v.a and IX.A.1.ii.a.1, as follows.

House of Deputies Rule of Order VI.C.3.v.a

3. Placing items on the Consent Calendar. Every Committee Reports on Resolutions or other matters will be placed on the Consent Calendar automatically unless:

- i. the committee votes to exclude it from the Consent Calendar;
- ii. it is removed in accordance with these Rules;
- iii. the Rules of Order, the Joint Rules of Order, the Canons, or the Constitution require a different procedure for considering the item;
- iv. the item has been set by a Special Order of Business; or
- v. the item is one of the following:
 - a. a report from the Joint Standing Committee on Program, Budget and Finance;
 - b. a. an election;
 - c. b. a Resolution of privilege or courtesy;
 - d. c. the confirmation of the election of the Presiding Bishop.

House of Deputies Rule of Order IX.A.1.ii.a.1

A. General Rules on Other Committees

1. Appointment and Creation

- i. The President may designate other Committees for the work of the House of Deputies at General Convention no later than 90 days before the first legislative day

of General Convention except that Conference Committees will be appointed during General Convention as needed.

ii. The Committees may include the following and any others that the President designates:

a. Resolution Review

1. The Resolution Review Committee will review all Resolutions submitted prior to General Convention to review that they are consistent with the polity of this Church, and that they are in the form required by the Canons, and to assess whether they have funding implications.

Joint Rules of Order

Pursuant to Joint Rule of Order X.25, the Task Force Recommends that the Joint Rules of Order be amended as follows.

Joint Rule of Order II.10

II: Joint Standing Committee on Program, Budget, and Finance

10.

a. There shall be a Joint Standing Committee on Program, Budget, and Finance, consisting of 27 persons being members of the General Convention (one Bishop, and two members of the House of Deputies, either Lay or Clerical, from each Province), who shall be appointed not later than the fifteenth day of December following each regular Meeting of the General Convention, the Bishops to be appointed by the Presiding Bishop, the Deputies by the President of the House of Deputies.

The Secretary of the General Convention and the Treasurer of the General Convention and the Chief Financial Officer of the Executive Council shall be members ex officio, without vote.

The Joint Standing Committee may appoint advisers, from time to time, as its funds warrant, to assist the Joint Standing Committee with its work.

b. Organization. The Joint Standing Committee shall elect its Chair from its membership, and such other officers as needed.

The Joint Standing Committee shall be organized in Sections, which shall conform to the major subdivisions of the Budget, as well as Sections on Funding and Presentation, the size and composition of the several Sections to be determined by the Joint Standing Committee.

The Chairs of each Section shall be elected by the Joint Standing Committee; the several Sections shall elect their own Secretaries from among their own membership.

The Joint Standing Committee may refer to a Section any of the duties imposed upon it by this rule; *provided, however, that final action on Budget shall be taken only by the full Committee, either in meeting assembled or by a vote by mail.*

c. During the interim between regular Meetings of the General Convention, the Joint Standing Committee shall act in an advisory capacity to the officers of the General Convention and to the Executive Council, holding such meetings as may be deemed necessary for the purpose.

Meetings of the Joint Standing Committee shall be called by the Chair, or upon the request of any five members thereof.

In respect of the Budget for The Episcopal Church, the Joint Standing Committee shall have the power to consider, and either by a vote by mail, or in meeting assembled, to make such adjustments therein, or additions thereto, as it shall deem to be necessary or expedient, and which, in its judgment, available funds and anticipated income will warrant; and it shall likewise have the power to adjust the annual askings of Dioceses within the limit established by the General Convention.

With regard to the General Church Program, the Joint Standing Committee shall:

- i. Meet and consult with the Executive Council, or its Administration and Finance Committee, on adjustments to the program priorities, and on alternate income generating resources;*
- ii. Receive from the Executive Council, not less than four months prior to the meeting of General Convention, the proposed General Church Program for the upcoming triennium, including a proposed detailed Budget for the year next following that of such Convention;*
- iii. Meet in such places as it shall determine, sufficiently in advance of the next General Convention to expedite its work;*
- iv. Conduct hearings upon such proposed Program and Budget; and*
- v. Consider such proposed Program and Budget and report thereon to the next succeeding General Convention.*

d. Not later than the third day prior to the adjournment of each regular meeting of the General Convention, the Joint Standing Committee shall report to a Joint Session, pursuant to Canon, a proposed Budget for The Episcopal Church for the ensuing Convention period, subject to the approval of the said Budgets subject also to increase, reduction, or elimination of items, based on open hearings held during the General Convention and by subsequent concurrent action by the House of Deputies and the House of Bishops.

Joint Rule of Order IV.14

IV: Supplemental Money Bills

14. After the adoption of the Budget for The Episcopal Church, any resolution calling for the expenditure of any moneys (or containing implied funding) shall be unfunded.

Subsequent sections V - X should be renumbered.

Joint Rule of Order VII.21

VII.21.

a. The Joint Standing Committee on Nominations, through the Office of the Secretary of General Convention, will secure background checks on its and any other nominees for Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund. These background checks will cover criminal records checks and sexual offender registry checks in any state where a proposed nominee has resided during the prior seven (7) years, any appropriate professional licensing bodies with jurisdiction over a nominee's professional status and any violations of state or federal securities or banking laws. The records checks of proposed nominees from outside the United States will cover the same information from comparable authorities in the place of principal residence of the proposed nominee.

b. The required background check will be done prior to accepting a proposed nomination.

c. Background check results will be reviewed by the Office of the Secretary of General Convention. If that Office, after consultation with the Chief Legal Officer, determines that the results should preclude a person from holding the office sought, the Office shall share the determination with the proposed nominee and remit that determination, but not the background check results, to the nominating authority. Background check information shall not be shared beyond the Office of the Secretary of General Convention, the Chief Legal Officer, and proposed nominees who request their own information. The cost of background checks under this rule shall be covered by ~~the General Convention~~ *The Episcopal Church* budget.

EXPLANATION

Canon I.1.2.m

If the elimination of the Joint Standing Committee on Program, Budget and Finance is adopted, then these revisions to Canon I.1.2.m provide a helpful redundancy, or reminder, to Standing Commission, together with existing Canon I.1.2.k.3.

Canon I.1.2.o

The Task Force proposes to delete this canon here and move it, with small amendments, to a new Canon I.4.4. This subsection was added to the canons in 2018. It was proposed by the Standing Commission on Structure, Governance and Constitution and Canons with the following explanation: "This change permits task forces to be created and commence prior to the first meeting of Executive

Council, allowing them more time in the triennium to do their work.” Since the subsection calls on the Presiding Officers to review all General Convention resolutions calling for “study or further action” and to recommend to the Executive Council the bodies they believe necessary to carry out the work; and for the Executive Council to act on such recommendations, including providing funding, it makes more sense for this provision to be in the canon on the Executive Council, Canon I.4.

Canon I.1.8

These amendments implement a generic, uniform title for the triennial budget of the Church, “The Episcopal Church budget,” and requires dioceses to pay their assessments, not all on January 1 of each year, but according to the schedule (currently monthly) established by Executive Council.

Canon I.1.9

These amendments (i) state that the Treasurer’s borrowing is on behalf of Executive Council, the governing body with authority between General Conventions; (ii) conform the title of the budget as explained above under Canon I.1.8; and (iii) clarify that any borrowing requires the approval of Executive Council, of which the Presiding Bishop, under Canon I.4.2.a, is the Chair and chief executive officer.

Canon I.1.11

The Task Force’s proposed amendments to Canon I.4.6 make clear that Executive Council would have the sole authority to propose the triennial budget to the General Convention. Accordingly, there would be no need for the Treasurer to also propose the same budget. (Note that the remaining three sections of Canon I.1.11 will need to be renumbered.)

Canon I.1.13

This amendment conforms the title of the triennial budget as noted above under Canon I.1.8. It also deletes an outdated reference to the "Expense" budget.

Canon I.2.6

These amendments conform Canon I.2.6 to the Task Force’s other proposed canonical amendments establishing the Executive Council as the Church governing body that submits a proposed triennial budget to the General Convention, and cross-references that canon.

Canon I.2.8

Consistent with prior proposed amendments, above, this change deletes the reference to the Joint Standing Commission on Program, Budget, and Finance.

Canon I.4.3

This amendment is consistent with the Task Force's recommendation to transfer all responsibilities of the Joint Standing Committee on Program, Budget, and Finance to the Executive Council, thereby eliminating the need for that Joint Standing Committee.

Canon I.4.4

As explained regarding the deletion of Canon I.1.2.0, since this canon calls on the Presiding Officers to recommend to the Executive Council the creation of various bodies to carry out the work specified by the General Convention, and for the Executive Council to allocate the funds for such work, it makes more sense to include this provision in the canon on the Executive Council than in the canon on the General Convention. The text of subsection o was moved in its entirety with the only change being to change "Presiding Bishop" to "Chair" and "President of the House of Deputies" to "Vice-Chair," the titles they hold in their roles in the Executive Council.

Canon I.4.6.a, c and i

These amendments further implement the Task Force's recommendation to have the Executive Council submit the proposed triennial budget to the General Convention, specifically to the Secretary of the General Convention. The changes also delete a redundant subsection requiring the Treasurer to also submit the proposed budget, and clarifies that the budget operates on a calendar year. The amendments strike current subsection c; for many years, once released the proposed budget has been distributed to the entire Church, making it unnecessary to direct Executive Council to send it to all Bishops and Provinces. Finally, the mention in subsection i of the Joint Standing Committee on Program, Budget and Finance should be struck.

Canon I.5.5

The Task Force concluded that the concept of sharing the Archives' expenses between the General Convention and the Executive Council is outdated. The triennial budget makes an appropriation for the Archives, and the canon need not mention any sharing of expenses., as there is no difference between the "Executive Council budget" and the "General Convention budget." The Task Force's

recommendation is to use throughout the canons and Rules of order the term, The Episcopal Church budget.

Canon I.9.10

This canon was adopted in 1928 and has been little used, according to the Annotated Constitution and Canons (White & Dykman). A Province that sought to take over the implementation of a General Convention-funded program could propose a plan for that to the Executive Council, which could take action to support the request, on a case by case basis with full access to the facts. The Task Force believes this canon is no longer needed and in addition seems arcane.

House of Bishops Rule V.D.d

With the Task Force’s proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council’s post-General Convention role of finalizing the budget, this Rule of Order is no longer necessary.

House of Bishops Rule VIII.I

This amendment implements a generic, uniform title for the triennial budget of the Church, “The Episcopal Church budget.”

House of Deputies Rule of Order VI.C.3.v.a

With the Task Force’s proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council’s post-General Convention role of finalizing the budget, this House of Deputies Rule of Order is no longer necessary.

House of Deputies Rule of Order IX.A.1.ii.a.1

This Resolution Review Committee “budget impact” task will no longer be necessary under the structure and sequencing of the Task Force’s recommendations.

Joint Rule of Order II.10

With the Task Force’s proposed elimination of the Joint Standing Committee on Program, Budget, and Finance, and with the clarification of the Executive Council’s post-General Convention role of finalizing the budget, this Joint Rule of Order is no longer necessary. (Note that the deletion of this Joint Rule of Order will require the succeeding Joint Rules of Order to be renumbered.)

Joint Rule of Order IV.14

The Task Force proposes to change the budgeting process for the triennial Episcopal Church budget so that after General Convention a budget committee of the Executive Council will review all resolutions adopted by the General Convention, especially those with budget implications and those setting the priorities for the Church, and make recommendations to the Executive Council for appropriate revisions of the budget adopted by the General Convention. Therefore, it would no longer be the case that resolutions adopted after adoption of the triennial budget would never be funded. In fact, such resolutions could be funded by Executive Council after it completes its post-General Convention review of all adopted resolutions to see if they should be funded by the triennial budget finalized by the Executive Council.

Joint Rule of Order VII.21

This is another amendment conforming the title of the budget to “The Episcopal Church” budget.

Supplemental Materials

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1. Appendix I - The Current Budget Process and its Disadvantages

Appendix I

The Current Budget Process and its Disadvantages

The Current Process

PB&F is established in Joint Rules of Order II.10 (page 346 of the Constitution, Canons and Rules of Order publication), with representative membership of 27 Bishops and Deputies appointed by the Presiding Officers. Additional DFMS staff support brings the number of meeting attendees to 35-40.

Normally, PB&F has held two face-to-face plenary meetings, which necessarily involve a large expense. The first meeting, usually in the fall prior to General Convention, is primarily for educating its members (many of whom are new and inexperienced) on the body's canonical duties, the budgetary process, and the current triennial budget. The second pre-Convention meeting (normally in February) is where PB&F officially receives the proposed budget from the Executive Council (see Canon I.4.6(a)) and begins the difficult process of understanding the budget in detail. Throughout the triennium, one or more PB&F officers have customarily attended most Executive Council meetings, working primarily with the Executive Council's Finance Committee.

During General Convention, PB&F continues to meet and revise the proposed budget. Open hearings are held where people may address special requests or concerns. In addition, PB&F frequently invites particular people to address the Committee or a subcommittee. The Joint Rules of Order require that a final proposed budget be presented to a joint session no later than the third day prior to adjournment. To accommodate translation and formatting, the final proposed budget must be completed 24-48 hours before the joint session. The respective Houses thereafter vote on the budget.

Disadvantages of the Current Process

The Task Force sees significant disadvantages with the current process. Most significant is the requirement to approve a budget before all priorities of General Convention have been established. To allow enough time for formal presentation of the budget, followed by each house, one at a time, debating and voting on the budget, PB&F's work ends four or five days before the end of General Convention, which is the period most of the resolutions come out of committee and are sent to the floor of each house, one at a time, for debate and vote. Thus, the budget may not include the true priorities of General Convention.

Another significant disadvantage is the steep learning curve required by PB&F members. In a relatively short amount of time, they must comprehend the large and complex triennial budget,

along with the extensive and detailed background knowledge needed to understand how and why each line item was included by Executive Council in the proposed budget. Additionally, the Church staff, after working throughout the triennium to help Executive Council members understand the line items in sufficient detail to make proper decisions, must now attempt to do the same thing all over again with PB&F members in a much shorter time period. The Church has been asking the impossible. In the time available, PB&F members cannot obtain the same amount of budgetary knowledge as the Executive Council finance committee members.

The current process is an inefficient, even wasteful, use of financial and personnel resources, which may not reflect the priorities of General Convention. Upon careful reflection and in consultation with past PB&F chairs and members along with staff, the Task Force believes a smaller body, adequately resourced, would be more productive and decisive. And upon further reflection, the Task Force believes that continuing the two-committee process itself is untenable.

TASK FORCE ON THEOLOGICAL EDUCATION NETWORKING

Membership

Ms. Sarah Stonesifer Boylan, <i>Chair</i>	Washington, III	2021
The Rt. Rev. David M. Reed, <i>Vice-Chair</i>	West Texas, VII	2021
The Rt. Rev. Lucinda Ashby	El Camino Real, VIII	2021
The Very Rev. Don Compier	Kansas, VII	2021
Ms. Amy Cook	California, VIII	2021
The Rev. Maureen-Elizabeth Hagen	Oregon, VIII	2021
Ms. Rebecca Hall	Texas, VII	2021
Ms. Karen Meridith	Tennessee, IV	2021
The Rev. Dr. Altagracia Perez-Bullard	New York, II	2021
The Rev. Kit Wang	Maine, I	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-A022 Create a Formation Networking Team

Resolved, That the 79th General Convention authorize a Theological Education Networking Task Force with membership appointed by Presiding Officers consisting of four lay persons, one priest, one deacon, and one bishop who represent the cultural and theological diversity in the Church, be established to serve as a networking and informational referral hub for the discernment, development, and dissemination of theological education and formation resources for lay and clergy leaders in small congregations; and be it further

Resolved, That the Theological Education Networking Task Force collect, assemble, evaluate, and publicize to dioceses and congregations the resources currently offered across The Episcopal Church for the training of commissions on ministry and discernment committees to focus on the education, training, and formation of leaders who serve in small congregations with a special emphasis on alternative theological education pathways; and be it further

Resolved, That the Theological Education Networking Task Force work with the House of Bishops, through agencies such as the College for Bishops, and with the Presiding Bishop's office and dioceses in collecting, disseminating, and encouraging the use of resources and best practices for identifying, educating, and forming clergy and lay leaders of small congregations; and be it further

Resolved, That the Theological Education Networking Task Force submit to the Executive Council Joint Standing Committee on Local Ministry and Mission a quarterly written report of its activities and complete its work by the 80th General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$60,000 for the implementation of this resolution.

Summary of Work

Executive Summary

The Task Force faced a three-pronged request within the mandate. Tackling these resolutions created a need for prioritization and streamlining of what was actually possible based on the networking and information during the three-year timespan available to complete the work. The Task Force, collectively, addressed the need to differentiate our work versus that of the Task Force on Formation and Ministry of the Baptized, which convened with sometimes perceived overlapping mandates.

With many different seminaries, universities, dioceses and other entities providing opportunities for ordination-track education, it became clear that documenting that current, available information on the programs and tracks would take up the majority of the triennium. Varying types of offerings (discernment, for lay leaders, or ordination-track) vary among regions. Overall, the alternative formation programs address the localized needs of ministry leaders, creating a focus on the unique circumstances found in that supporting area. There is a lack of cross-pollination, and simply, data on what each program offers and how they are forming their future ordained leaders. Thus, theological education networking and information gathering became the main focus of the Task Force's work.

The Task Force spent several months determining the most important information points to gather, as well as how to go about doing that. Starting with the Task Force's networking and researching skills, the categories became clear: Episcopal seminaries, non-Episcopal seminaries with Anglican year, alternative formation programs, Iona Collaborative programs, and competencies.

Data from these categories' programs and initiatives were then put into a spreadsheet that organized based on name, place, sponsoring organization, contact information, training focus, website, cost, description, and other pertinent details. The Task Force did a preliminary review of all diocesan websites to pull information about possible formalized formation programs. After this initial review, the Task Force then asked the diocesan contacts to edit and provide feedback on their own information as well as any others that were not included. The last round of requests went to diocesan bishops and canons to the ordinary.

Survey Request

The review request, in English and Spanish, went to the formation program contacts as found by the initial Task Force membership. In June 2020, the General Convention Office sent out a survey that was open for approximately five weeks to solicit feedback and correct details. Sent to a targeted group of 122 formation program coordinators, requesting to provide better viewpoints and details of programs and resources. As a follow-up, the diocesan bishops and canons to the ordinary were asked to review the information and/or forward the survey request to the relevant respondent. Out of those requests, the task force received 38 responses from the GCO survey and then the group followed up with personal requests.

Survey Results

The overview of the Episcopal seminaries, non-Episcopal seminaries with Anglican year, alternative formation programs, Iona Collaborative programs, and competencies documented information for over 116 programs.

The datasheets include as much information as possible about programs found beyond the continental United States.

Find the link to the full data set here: http://bit.ly/TF_Education

Observations

The survey requests and information gathering went out during the first six months of the COVID-19 pandemic. As of writing this report in January 2021, the long-term impact of COVID-19 has yet to be fully understood on vocational formation programs and initiatives. The short-term shift has provided opportunities to learn and experience community and pedagogy in online systems. The experimentation happening in some programs has breathed new life into vocational education for

students and instructors. A few programs have decided to wait until more “normal” in-person gatherings can resume. The fear is, much like community-based ministry, how will traditional and alternative education paths survive if they are not flexible to online communities and other ways of gathering?

The task force came to understand the more consistent need for exploring cross-pollination of students, instructors, platforms. Understanding that each program is unique for its own community context, what are the commonalities and overlaps that can be developed to create stronger ordination-track programs to promote community-building and skill-building? With the abundance of experience and trained teachers within local formation programs, there is the possibility of taking the best teachers and trainers and widening their impact and lessening the load within smaller, stretched programs.

Programs like CALL from Church Divinity School of the Pacific and Iona Collaborative housed at Seminary of the Southwest are heavily used across the Church. Relying on these adaptable offerings and curricula gives the main track of classes and foci to those vetted programs and teachers, allowing the local formation schools to shape contextual learning based on regional needs and initiatives.

With the increase of local, alternate formation programs, we are aware of varying standards and intensity of trainings offered. In 2020, the General Board of Examining Chaplains read 44 exams from candidates designated from local or alternate programs. This 2020 statistic is the first listed with this preparation option. In previous years, the General Board of Examining Chaplains included only “No Episcopal/Anglican Seminary”. In 2019, 52 exams fell into this category, an increase of 2 from the previous year. The exams in 2017, 38 candidates were under the “No Seminary” designation. This steady number, whereas other seminaries decreased, indicates the increasing use of local and alternate formation program options. As with all these statistics from the GBEC, these reports do not include those ordained whose dioceses do not require the GOEs. Beyond the GOEs, there is no agreed-upon standards across the church for ordination-track training programs.

Ultimately, does the efficacy of the formation programs result in a more diverse ordained leadership base that reflects the needs of the region? Or does it continually offer the same educational and formational experiences to the same group who is currently within ordained ministries? How do the parish and diocesan discernment processes accurately shift to raise up a wider population into discernment and then into ordination programs, whether traditional or alternative?

Proposed resolutions

A085 Creation Of A Digital Hub For Formation Resources (In English, Spanish, And French)

Resolved, the House of _____ concurring, that the 80th General Convention instruct Executive Council to implement the recommendations of the Task Force on Formation and Ministry of the Baptized and the Task Force on Theological Networking to develop a plan for a sustainable digital hub for Episcopalians to access formation resources for lay and ordained vocations; and be it further

Resolved, that Executive Council present a report with the plan (to include recommended structure, content, staffing, timeline, and budget) to the 81st General Convention; and be it further

Resolved, that \$30,000 be budgeted for the work of developing this plan over the next triennium.

EXPLANATION

The Task Force on Formation and Ministry of the Baptized and the Task Force on Theological Networking are short-term solutions for work that needs to be on-going at a denominational level. This online hub would provide vetted resources for leaders to adapt for their contexts. The curation by subject-area experts gives the opportunity to uplift voices from around the Episcopal Church and Anglican Communion. Given the variety of situational needs, giving leaders a place to begin will set them off on the right path as they explore their own spiritual discernment, help to develop others' discernment process, or prepare for ordination formation could be.

This online hub will connect seekers of discernment resources with proven formation processes, materials, and networks to facilitate vocational development, without having to develop tools on their own. To uplift exemplars and alternative ministry models' development processes would give leaders a more expansive resource list as they nurture faith communities for an uncertain future.

Refer to the resolution explanation provided by The Task Force on Formation and Ministry of the Baptized for more information and details.

TASK FORCE ON THEOLOGY OF MONEY

Membership

The Rev. Evan Garner, <i>Chair</i>	Arkansas, VII	2021
The Rt. Rev. Kevin Brown, <i>Vice-Chair</i>	Delaware, III	2021
The Rev. Dr. Gawain de Leeuw	New York, II	2021
The Rev. Candice Frazer	Alabama, IV	2021
The Rt. Rev. Gayle Harris	Massachusetts, I	2021
The Rev. Gia Hayes-Martin	California, VIII	2021
Mr. W. B. McKeown	New York, II	2021
The Rev. Mary Beth Mills-Curran	Massachusetts, I	2021
The Rt. Rev. Kirk Smith	Arizona, VIII	2021
Dr. Steven Tomlinson	Texas, VII	2021
Ms. Celeste Ventura	El Camino Real, VIII	2021
Mr. Doug Walker	Florida, IV	2021
Ms. Erin Weber-Johnson	Minnesota, VI	2021
Mrs. Pamela Wesley Gomez	Connecticut, I	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. John F. Dwyer, resigned 2019
 The Rt. Rev. Lawrence C. Provenzano, resigned 2020

Acknowledgements

Dr. Amy Thayer

Mandate

2018-A061 Create a Task Force on Theology of Money

Resolved, That the 79th General Convention direct the Presiding Bishop and President of the House of Deputies of The Episcopal Church to appoint a Task Force on the Church's Theology of Money, consisting of four (4) bishops, five (5) presbyters or deacons, and six (6) lay persons, who represent the cultural and economic diversity of the Church; and be it further

Resolved, That the Task Force be directed to use scripture, approved liturgical resources, other theological texts, and previous actions of General Convention to summarize the ways in which The Episcopal Church understands the theology of money and financial resources in the way we give, invest, and spend; and be it further

Resolved, with regards to investment beliefs, that the Task Force should examine the following elements of responsible investing consistent with the Church's faith and mission as practiced today by many institutional investors across the Church: applying ethical guidelines in investment selection and management, shareholder activism, and investing for responsible social and environmental outcomes as well as financial return; and be it further

Resolved, That the Task Force be directed to present its findings and recommendations to the 80th General Convention; and be it further

Resolved, That the Task Force be directed to make available its findings and recommendations as a resource to guide and inform policy on giving, spending, and investing across The Episcopal Church; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$30,000 for the implementation of this resolution.

Summary of Work

Concerning Our Report

At the 79th General Convention, our task force was created and charged with summarizing the ways in which The Episcopal Church understands the theology of money and exploring the ways that institutional investors across the Church use particular methods for responsible investing. To accomplish our work, we met monthly on Zoom beginning in April 2019 for a total of nineteen virtual meetings plus subcommittee meetings. We interviewed representatives from dozens of congregations, dioceses, and other institutions throughout the church. And we conducted a survey of individuals' attitudes and beliefs about money.

We found several themes that are common throughout the Church: that the Church does have a claim about the use of money; that debt is of Christian concern; and that the nature of the Church's investments is important. We also noted the overall lack of theological resources available to guide congregations, dioceses, and other Church-wide leaders when they make decisions about their personal or organizational finances.

As a structure for our report on the Church's understanding of the theology of money, we use the Church's principal service of worship, the Holy Eucharist. Our liturgy is, at its core, an expression of the theology of gift and giver, of blessing and abundance. It has been said that all statements of the Church are essentially theological. Indeed, if the Church is the very Body of Christ manifest in this age, what we say and do as the Church reflects what we say and do and understand about God. We offer this report as a reflection of the Church's teachings about money from the past and as a structure for its continued work in this area. In each section, we raise some of the theological questions that we have encountered in our work, which we commend to the Church for further consideration.

The Word of God

Opening Acclamation: Defining the Community

Whether assembled in person or virtually, the Christian community is gathered together liturgically through call and response. In the words of the Opening Acclamation, we define ourselves as the ones who have come together to bless God and to proclaim the resurrection of God's Son. As the *ekklesia*, we have been called out of the wider community because of our pursuit of God's reign—the Kingdom we proclaim as blessed "now and forever."

That pursuit of the Kingdom of God guides the ways that we approach money. Our theology of money impacts our everyday decisions, including authority, administration, compensation and benefits, capital and long term investments, budgets, legacy giving, hospitality, our common life, the use of volunteers, and expressions of gratitude. Although we continue to live in a world in which wealth is aligned with power, we have been called into a community of people who seek to worship Jesus—the one who for our sakes became poor—and not Mammon. Even before we identify the forms that our ministries will take, we define ourselves as a community that must take clear and faithful and God-inspired positions on lending, sharing, tithing, investing, debt forgiveness, interdependence, materialism, and consumerism.

As we gather, we ask...

- What is Mammon?
- How does our encounter with money, finance, and economy animate and inform our pursuit of the Kingdom of God?
- To what extent do we come to church in search of a better god than Money?

Song of Praise: Acknowledging Our Creator

During the triennium, we invited representative individuals throughout the church to complete a survey about their own understanding of the theology of money. This survey was translated into multiple languages and sent out through the Episcopal News Service in order to capture the breadth of the Church. We received over six hundred responses, out of which several common themes emerged. One of those was a clear belief that money does not belong to humans; it belongs to God. Respondents indicated that, like other spiritual gifts, God gives us money as a tool to share as we undertake God's work in the world. This is the belief from which the Church's understanding of the theology of money emerges. As one respondent stated,

Our Christian tradition holds that we should all have equal access to money and resources; that being wealthy does not confer a special status or reflect God's favor or the industry or intelligence; that God has a preferential option for the poor; that we live in a culture that demonizes the poor to support extraordinarily unequal and unfair access to resources; and that our primary task as the Body of Christ is to envision and pursue the realm of God, in which all are fed and love supplants power and wealth as primary values.

Just as the Gloria or other song of praise is sung at the beginning of our eucharistic liturgy to name the one to whom our praise is offered, we begin our theology of money with the belief that God is the giver of all good gifts and that all things belong to God.

As we praise God, we ask...

- Where do we believe our money comes from?
- How do we come to possess it?
- What kind of god gives us money?
- What sort of faith do our habits of spending, saving, working, and giving bear witness to?
- What beliefs ground our economic habits?

The Collect of the Day: A Theological Opportunity

In the liturgy, before the appointed scripture lessons are read, the presider focuses the congregation's attention and gives voice to the assembly's intentions by offering the Collect of the Day. Written to reflect the particular liturgical observance being undertaken, the Collect typically reflects one or more of the themes contained in the lessons. As such, it invites the assembly into theological engagement by collecting and uniting the various prayers of the congregation in anticipation of what will be proclaimed as God's Word.

We name in this report the urgent need for the Church to explicitly and intentionally engage its people in the work of the theology of money. Our survey revealed that, with the exception of annual stewardship campaigns, congregational leaders do not regularly discuss money, and, when they do,

the ensuing conversations are commonly cloaked in secrecy and couched within the context of scarcity.

First, [church leaders discuss money] with silence and secrecy. And hagiography for "the old days" when the parish had more members. There was a strong push for me to not know about the individual giving of parishioners—which is a luxury reserved for a parish without deficits, frankly. Second, with sabotaging stewardship campaigns—the two years before I arrived as their priest they had not successfully completed a stewardship campaign, and it had been 21 years since the last capital campaign. Third—with a good helping of fantasy and dependence on unrestricted gifts that they call "savings" even though they are not the result of excess money saved but of gifts from the past. The reality here and in our larger political reality is this: Deficits are very convenient things to allow especially the most conservative or the biggest givers to control what the parish does—and does not—do. Repeat that statement five times over. - Clergy Survey Participant

Our congregation does not usually talk about money except toward the end of the year when some are worried about a pending deficit, or during the fall "stewardship campaign" when encouraging members to give more. The Vestry and other committees usually are talking about money from a sense of scarcity; the endowment committee often talks about it as if it were a sacred treasure to be protected for its own sake. I am not sure the Vestry talks theologically about their own stewardship and role in leadership regarding money. - Survey Participant

Nevertheless, despite the lack of direct theological engagement by clergy and lay leaders, survey respondents indicated a desire to use their money to respond to God's call. In other words, people are hungry for leadership in the area of faith and finances, and the Church must embrace the opportunity to collect those desires into resources for theological education.

As we pray, we ask...

- What prevents us from being transparent and open about money?
- How do Episcopal clergy systematically self-censor about money? What are we afraid of? What would we be saying if we were not afraid?
- What questions are parishioners asking that we do not have good answers for?
- Where might engaging the theology of money and richer practices of stewardship respond to our congregants deeper theological aspirations?

The Lessons: Underused Scriptural Resources

The scriptures are full of stories, commandments, and examples of how God's people are called to use the financial resources entrusted to them by God. Our survey showed that the people of our Church are familiar with passages like The Widow's Mite (Luke 21:1-4), The Eye of a Needle (Mark 10:24-27), Where Your Treasure Is There Will Your Heart be Also (Matthew 6:21), and The Love of

Money Is a Root of All Kinds of Evil (1 Timothy 6:10). Although less commonly cited, respondents also identified passages like To Whom Much is Given, Much Will be Required (Luke 12:48), No One Can Serve Two Masters (Matthew 6:24), Lay Not Up For Yourselves Treasures Upon Earth (Matthew 6:19-20), and passages about jubilee (e.g. Leviticus 25:1-4). Such recollections represented substantial theological engagement.

[I remember] the most often misquoted: "For the love of money is the root of all evil." It is important to understand that money—in and of itself—is not evil. It is a means of economic exchange. It is a valuation placed on our work. I value my work and expect my employer to also value my work. I value the work of the person who repairs my car, the person who cooks or serves a meal to me, the people who taught my children. It is only when money becomes the end in itself—simply a scorecard in a game of conspicuous consumption—that love of money is evil. - Survey Participant

I don't use biblical texts, not because the texts are bad, but because they come so larded with other people's ingrained interpretations of them. I use Sadi's parable about the fox and the tiger often. - Survey Participant

There are many more passages from the Bible that speak to the theology of money, and the survey demonstrated a clear association of financial resources with scripture. That survey respondents were able to name so many is a sign that the lack of conversations about money in parishes does not necessarily indicate an absence of theological formation among those in the pews. On the contrary, scripture provides a ready and accessible foundation for the Church's teaching on the theology of money. We believe that the Church needs to develop teaching resources that build upon that foundation by connecting passages from the Bible with the practical situations that individuals and parishes face.

As we hear God's Word, we ask...

- What difference does the Christian faith make in economic practice?
- What values are we expressing in how we spend, save, earn, and otherwise use our money?
- How are we teaching people how and why to give?

The Sermon: The Church's (Missing) Proclamation

Sermons are opportunities for practical theology—the integration of our faith and practice. Although the sermon is the principal opportunity for clergy to break open the Word of God for the congregation, our survey results show that, with regard to money, clergy are not doing so. This may be from fear of criticism that "the church is always talking about money" or from embarrassment at their own unwillingness to be a model of generosity. Accordingly, respondents indicated that theological formation in the area of finance comes from family members, particularly parents and grandparents. Again, the Church must capitalize on the opportunity to build upon the domestic formation that does take place and begin to teach its people about the theology of money.

We were poor and were taught to NEVER ask for gifts. I don't even ask now. - Survey Participant

I participated in a HIV/AIDS fundraiser walk that required solicitation and support of friends, family, and my community. I suppose I still think of it in terms of how generously people responded when asked (which is not necessarily what I was expecting). - Survey Participant

Our survey named older family members, especially those who lived during the Great Depression, as primary resources for that formation. The Church could offer intergenerational programs that highlight the ways in which our collective theology of money has been shaped by the experiences of different generations, but it must do so with haste. Whether in preaching, teaching, or other methods of proclamation, leaders in the church, both lay and ordained, must address people's hunger for expressing deep value and meaning through their financial lives.

As God's Word is broken open, we ask...

- What opportunity are we missing when we fail to preach and teach about money in our churches?
- Where are we finding opportunities to make administration of the shared resources of our common life occasions for Christian formation and witness?
- In what important ways is the economy of the church materially different from the economies of other institutions in our culture?
- What obstacles prevent us from building a common inheritance?
- What obligations do we have to those who came before us and will come after us—to the Communion of Saints?
- How are we connected to and in conversation with the Communion of Saints across time?

The Creed: The People's Faithful Response

In our liturgy, the Nicene Creed is part of the congregation's response to the proclaimed Word of God. It is a response to what we have heard about God and Jesus Christ in the lessons and in the sermon, and it expresses both the congregation's participation in the shared faith of the universal Church and their desire for continued formation in the Way of Jesus.

Despite the overall lack of financial formation in the Church, our task force identified several ways in which the institutions of the Church, including the General Convention, the Constitution and Canons, and the *Book of Common Prayer* express convictions about money. Repeatedly, the General Convention has expressed its understanding of the theology of money through resolutions that support debt justice, fruitful stewardship, administrative competence, and worldwide mission. The Church claims that money is to be used in the service of Christ. To this end, the right use of money requires formation.

The Canons affirm the importance of forming disciples "concerning Christian stewardship," including "the biblical standard of the tithe" (III.9.6.b.2), and the role of vestries in the care of the "corporate property" of parishes (I.14.2). In addition to the eucharistic liturgy, the *Book of Common Prayer*, through its intercessions and collects, shapes our expectations of money and our power over it.

We also note, especially during the Covid-19 pandemic, that individual congregations continue to find new ways to transform the financial resources entrusted to them into expressions of security in times of vulnerability, hope in situations of lack, and joy in the midst of scarcity. Behind every mission and program that requires the allocation of parish resources is a presumed theology of money, which may or may not be made explicit by the leaders and members of the congregation. When those theological connections and teachings remain unexpressed, the financial decisions can reflect a theology that is contrary to the teaching of the Church.

When things get tight per my way of looking at finances, I pray for help in managing what I have or figuring out how to make things work out the way "I think" they should. I don't recall just praying for more money. I have always had enough to cover the basic needs for my family and realize that I am very fortunate that I can say that. Praying for guidance to be a better steward of the great bounty I have been given. - Survey Participant

YES, yes, yes! I pray for wisdom. I pray for enough hours of work and maybe even a raise to be able to support my family better. I give thanks for my house being paid for, especially when I couldn't make the payments. I pray for ways I can help others. I give thanks that my parents and my church are good money managers. I pray that this year there will not be a money-draining disaster. - Survey Participant

As we respond in faith, we ask...

- What does Christ require of people with power?
- How can our money serve others in the spirit of Jesus?
- What obligation do we have to discern the individual and systemic effects of our economic actions on others?
- What is our responsibility to the needs of others, including the selfish and ungrateful?
- How do the needs of others create an opportunity to discern our salvation in Christ?
- What do our practices around money tell us about what we think about it?
- How does our stewardship of money express the values of our community and our view of the future?

The Prayers of the People: Opportunity for Missional Focus

In the eucharistic liturgy, another response to the proclaimed Word of God is the Prayers of the People—an outward-focused, missional, and practical expression of the consequences of what we believe. In our prayers, we hold before God the needs of all creation, especially those of the Church,

those in civil authority, the welfare of the world, the concerns of the local community, those who suffer or are in any trouble, and the departed (BCP p. 383). Those prayers are not merely wishful thoughts for those we love. They are an expression of our faith—loving responses that grow from our fervent belief that God cares for and saves those in need. Not surprisingly, the respondents to our survey expressed ways in which they understood the theology of money to be expressed primarily in caring for those in need.

Yes. We give thanks for the blessings that we have—especially now during this coronavirus period when so many people are out of work. We have a steady retirement income, a roof over our heads, enough to pay our utilities, and the ability to help others who may not be so fortunate at the moment. I pray that God will help us be good stewards of his bounty. - Survey Participant

Individuals reported that generosity in any form is a means of giving to God, particularly when those generous acts contribute to the needs of others. Respondents named giving as a privilege and, as a spiritual practice like prayer, acknowledged a desire to continually give more each time they are called to do so. Interestingly, very few respondents indicated that they pray for or about money except when seeking God's guidance for stewardship as an opportunity to increase their generosity toward others. Gratitude for financial resources was named as a common way that people included money in their prayers.

The congregations and dioceses of the Church engage in many programs that express an implicit understanding of the theology of money, including jubilee proposals, the purchase and forgiveness of medical and other debts, direct financial assistance to the poor, and microlending programs. As we note below, there are many institutional investors across the Church that are making investment decisions that reflect their commitment to economic justice. These are, at their core, responses to what we believe about God and money, but the Church is failing to make explicit the connection between those practices and the underlying theology. In addition to teaching and preaching, the Church can use prayer as a means to connect belief and practice by stating God's vision for our economic reality and seeking God's help in living into that vision.

As we hold the needs of the world before God, we ask...

- How does our understanding of the common good orient our investments or purchases?
- How does the way we hire, manage, and pay staff reflect the Christian faith?
- How does money express the value of time or work?
- How do we negotiate the tension between eschatological aspiration and practical, daily necessity?

The Confession: Acknowledging the Church's Failures

As defined in the Catechism, "Sin is the seeking of our own will instead of the will of God, thus distorting our relationship with God, with other people, and with all creation" (BCP p. 848). In the

liturgy, we confess our sins "in thought, word, and deed, by what we have done, and by what we have left undone" (BCP p. 360). With regard to our use of money and our acceptance of and participation in systems that create and sustain inequality, the Church must confess its sin and must confront the sin of our wider culture.

Many respondents to our survey indicated that money has produced obstacles that mitigate or prevent them from living out God's purposes. More specifically, those who live in the United States reported that the realities of living within a culture that highly values income and wealth creates a personal need to hoard financial resources for fear of scarcity and/or decline. In turn, that reduces the amount and frequency with which those individuals make charitable gifts, including to those causes and institutions that implement God's work. Again, those results show a desire among the people for a proclamation of the theology of money that transcends the culture of scarcity in which the world acts.

I sometimes think I've made too many compromises for the sake of comfort. It has confounded my ability to make real friendships across economic classes. - Survey Participant

Money is also a source of anxiety, especially in an out-of-control, artificially expensive economy. Especially as we grow older, the anxiety or fear of running out of money is very real. Sometimes a sense of "this is a limited resource" hinders participation in work that one would like to do or take a pass on opportunities that seem too expensive at the time. The scale of the economy and cost of living distorts the importance, value, and possibilities of money. Too many things just cost too much and that impacts obtaining basic necessities. - Survey Participant

Additionally, we must lift up one glaring lack in this current report that requires further study by the Church. No theology of money can be written by The Episcopal Church without recognizing how its physical and economic structures were built upon the financialization and productivity of black bodies through forced labor. Such a history will most likely reveal the uncomfortable connection between international markets, the accumulation of wealth, and the violence required to constrain the free movement and organization of mainly black people during the colonization of the Americas. Historically, we are a Church of the wealthy and the elite. Many of our church buildings were built by enslaved human beings. Much of our generational wealth, including parish, diocesan, and institutional endowments, was amassed at the expense of human capital. Black bodies were used as collateral, as debt and credit, as numbers on a balance sheet.

That bodies can be used as numbers illuminates the sin and brokenness at the heart of this project, but it may be time for us to enter into deeper conversations about what slavery itself tells us about money and our relationship to it. It may also give us a better sense of what alternatives may await us when we consider our own responsibility to future generations and our life together. Our reliance upon money as an expression of power has shaped the culture of our Church in innumerable ways. Some parishes, dioceses, and other institutions have begun to address that legacy of sin in tangible

ways. Most have not. The process of developing intentional teachings on the theology of money provides an opportunity for the Church to confess those sins of the past and present. It is a work that we must pursue, an act of repentance that we must accept.

As we confess our sins, we ask...

- How do our economic practices liberate or enslave us?
- Where do our investments facilitate injustice that we are otherwise opposing?
- What investments that oppose injustice will have the broadest support?
- How are we using the power we have to influence actors in unjust systems?
- How do we discern when to engage and when to divest?
- How do we talk about our participation in a system we cannot yet "afford" to leave?
- How does our wealth affect or reflect our risk tolerance?

The Peace: In Pursuit of Meaningful Reconciliation

As the congregation prepares to share Communion with God and each other, the passing of the Peace is a symbolic way for those who have gathered to express their unity in reciprocal ways. As Jesus taught in Matthew 5:23-24, if you are offering your gift at the altar and remember that a sibling has anything against you, you should first be reconciled before offering your gift. In that way, the Peace is a means by which the people affirm their status as reconciled to one another before sharing Holy Communion. As one survey participant expressed, "I pray for a spirit of generosity for me, my people, and all my parishes."

As the Peace emphasizes, spiritual reconciliation is not possible if physical or financial reconciliation has not been pursued. In order to promote that reconciliation, the Church must address the tension between our practical and aspirational intentions around wealth. We cannot proclaim Jesus Christ as the one who has come to reconcile us to God and to one another if we are not following his Way of reconciliation as individuals, congregations, dioceses, and institutions.

As we share the Peace, we ask...

- How do our economic practices help us build relationships?
- How should a diocese arrange the sharing of resources between churches?
- What responsibility do we bear for injustices done in the past?

The Holy Communion

The Offertory: Examples of Aligning Money and Mission

When we pass the alms basins or offering plates or, in pandemic times, put out a basket or solicit online contributions, we invite individuals to decide what part of their God-given bounty they will share with the Christian community. Although not the only economic moment of the eucharistic

liturgy, the offertory is the one moment when money, along with other the gifts that are presented at the altar, becomes the focus. The Canons assume that money is a part of the fabric of our common life, and the Offertory is an opportunity for everyone to contribute (1.6-7). For each person or household, this is an opportunity to express what one believes through one's actions.

In our work, we interviewed representatives of more than a dozen institutions that invest their financial resources in ways that intentionally express the faith and mission of the Church. They include parishes of various sizes and dioceses from across the country. Each one has a different story of how they integrate faith and investing while not only preserving their fiduciary obligations but also furthering them as part of their Christian leadership. We share some of those stories here but include all of them in the "Investing as Doing Theology" report which can be found in the supplemental materials section of this report.

Churches as diverse as Ascension in Hickory, NC; All Saints in Pasadena, CA; St. Bartholomew's in Baltimore, MD; and Trinity in Indianapolis, IN; have committed to applying analysis of environmental, social, and governance (ESG) factors in order to manage their assets faithfully. Indeed, almost all of the parishes and dioceses we interviewed apply ESG.

In four of the institutions we interviewed, fossil fuel divestment was a catalyst for changing investment practices, but those institutions soon moved beyond that one issue. Divestment as a strategy was not abandoned, but, in these four cases, the focus shifted to affirmative investing in order to support positive change on a range of concerns consistent with the Church's faith. For example, All Saints', Pasadena, partnered with the Church Investment Group to create a new multi-asset fund, which takes into account positive environmental practices, resource efficiency, sustainable business practices, strong corporate governance, good relationships with stakeholders, and other activities that enhance the long-term sustainability of its investments.

Similarly, the Diocese of Oregon created a new socially responsible investment fund for parishes and other institutional investors in the diocese. Through its diocesan convention, the diocese has established a list of Gospel-focused affirmative investing priorities for the new fund as well as a list of negative priorities that should be avoided.

Some of the parishes and dioceses we examined have pursued opportunities for investing directly in communities locally and abroad. For example, St. James in Black Mountain, NC, decided to shift its cash assets from a traditional bank to a local credit union that was committed to community development and lending to underserved populations in Appalachia. At St. Stephen's of Ridgefield, CT, the youth used parish resources to make microloans in developing countries.

All of these examples show that the administration of the Church's investments is theological practice. A theology of money recognizes money does not move itself but is directed and guided through institutions that identify and clarify their values and are implemented by real persons with consciences. In short, money cannot be divorced from the institutions that direct them. There is no commerce, no market, no exchange without people directing them, guided by their structural

practices; therefore, the care of how we manage our investments implies that administration reflects that money should be under the care of theological priorities.

These examples show ways in which the Church believes that investments should reflect its faith commitments. This includes mission statements, core values, and focused projects that an institution might take, such as building a credit union or a community development financial institution that builds housing. This, taken in itself, is a remarkable claim. That investments should reflect our faith is in stark contrast with the dominant view in the marketplace, that the sole purpose of money is to create more of itself.

While the two may be complementary in practice, they reflect two different foundational dispositions toward the nature of money. When faith directs money, priority is given to the One who is the source of worship—God. If money is to be solely its own criteria for movement, then the institutional focus may not be the values of the Church but whatever money seeks—Mammon.

We can observe examples of how the Church, through its congregations, dioceses, and other institutions, has responded to the Spirit's movement in broad categories. The examples we highlight are not exhaustive, as there are many different ways that individual communities direct their resources, but we can say that the Spirit is guiding the Church in both general and particular ways through the faith-guided financial decisions that religious communities make.

The Church's participation in environmental stewardship through responsible investing is another example. By spending its money on behalf of saving the planet, the Church affirms its belief that the world matters. This is congruent with our incarnational theology of the world and the biblical affirmation of the earth's bounty as a gift from God.

In 2015, the Anglican Communion Environmental Network, a group of sixteen Anglican bishops whose people and dioceses around the globe were threatened by climate change, wrote in the *The World Is Our Host*,

We call for a review of our churches' investment practices with a view to supporting environmental sustainability and justice by divesting from industries involved primarily in the extraction or distribution of fossil fuels.

We call for the strengthening of ethical investment guidelines to include consideration of justice for the non-human creation as well as the interests of future generations of humanity... the climate change crisis is the most urgent moral issue of our day.

The Church has also used the tools of proxy voting, divestment, and long-term social investment as expressions of faith. Since the late 1960s, when Episcopal churches challenged Kodak to hire African Americans in Rochester, New York, and fought for divestment from South Africa, Episcopal Church bodies have played a role in harnessing their investments as a form of economic power. In some cases, such as gun manufacturing, they have become proxies to demand actions. In others, like fossil

fuels, they have divested to invest in cleaner sorts of energy. And in other cases, they have invested in entrepreneurship.

The Church believes that money can be used to enhance its prophetic witness for the sake of the gospel. It can be used to force institutions to uphold their values in the case of proxy voting or make a statement of public value in case of divestment. It can seek to share its economic power through funding entrepreneurs, credit unions, or community development funds. As a Church, we have demonstrated our belief that money is a legitimate form of institutional power to be used on behalf of Christ.

The Church affirms a diversity in investments that accounts for local needs. We see Christ in the particular lives of individuals who will better thrive through the praise and support of the fuller body. Local investments signify the dependence and interdependence we have upon one another, providing manna that individuals need to be sustained on the journey. The money we have is to be used to develop the true currency we have: the bodies of the faithful for the sake of the greater body. Money is for the purpose of developing people who are fully alive in Jesus Christ.

The Great Thanksgiving: Celebrating God's Saving Work

The Eucharist is the principal act of Christian worship and expresses our thanksgiving and praise for God's saving work in Jesus Christ. In the Great Thanksgiving, we recall in particular Christ's death and resurrection and the new life of freedom and flourishing that God conveys to us through the paschal mystery. In the Lord's Prayer, we ask repetitively that God would give us today our daily bread. We proclaim our commitment to forgiving the trespasses (literally "debts") of others as we ourselves have been forgiven.

One survey respondent, whose congregation does discuss money, named the ways in which the Eucharist reflects God's economic vision:

Sacramentally, the question is, "How do we use our money to fulfill our baptismal vows individually and corporately?" Then we give thanks for the Eucharist, which feeds us to participate in God and for the gifts God gives us for that work, including money.

In a few congregations, this connection between the Eucharist and the theology of money is being expressed. In others, even when that connection is not named, the celebration of the Eucharist provides an opportunity for intentional theological formation around the theology of money.

The Breaking of Bread: Distribution of Resources

Communion is not a celebration or mystery to be observed but one in which the people participate. The one bread is broken and shared so that the people can be united with God and with each other through Christ. We eat the Body of Christ and, in so doing, become more fully the Body of Christ. As with any resource, how that spiritual food is distributed to the people is itself an expression of theology.

Participants in our survey expressed their understanding that money, while impermanent, is in abundance. Given that they also named the culture of scarcity in which they live, that perception of abundance is a statement of faith and names something of spiritual value. The Bible is replete with examples of how the community of faith is called to redistribute that abundance to ensure that everyone is given enough. The Church's Jubilee centers are examples of ministries that seek to redistribute the community's resources so that the poor have enough.

As we receive the elements, we ask...

- How much is enough?
- How does the idea of enough or of sufficiency speak to our salvation in Christ?
- How do we distinguish between needs and wants?
- How do we discern the needs of other congregations in our dioceses?
- How might we discuss each other's needs in the spirit of Jesus?

The Dismissal: Equipped for Service

In the eucharistic liturgy, the dismissal is an integral part of the service. The people of God have been nourished spiritually to do the work God is giving them to do. In many ways, that work takes the form of financial considerations—budgets and bills, debt and investment, giving campaigns and capital improvements, clergy compensation and diocesan assessments. Each of these invites us to apply our theology of money.

We conclude our report by acknowledging that there is much work left to be done. Our mandate was to summarize the ways in which the Church understands the theology of money and to report on the specific ways that institutional investors use techniques for socially responsible investing. In doing so, we have raised as many questions as we have answered. We believe that the Church in every manifestation—individuals, households, parishes, dioceses, institutions, and the denomination as a whole—repeatedly expresses through its decisions its various theologies of money. Although as numerous as the contexts and experiences in which the Church is found, those expressions grow out of a shared faith. At this point in the life of the Church, we have not done enough to articulate those common themes and to form our people in the way of financial discipleship, but the Church is not starting from scratch. Now the Church must take advantage of that faithfulness and commit to the formation of disciples by teaching and proclaiming its theology of money.

As we depart, we ask...

- How does what we believe about God and express through the liturgy of the Church impact our daily lives as individuals and as congregations?
- How does money impact vocational discernment and following our call?
- How does our wealth affect or reflect our risk tolerance?

Coffee Hour: Survey of Emerging Money Narratives, Executive Summary by Dr. Amy Thayer

This report shares the findings about Episcopalians' attitudes and perceptions about money as well as the role currency plays within their lives, parish, and Church. The findings presented are representative of a convenience sample of approximately 600 respondents (n=604) with an association with The Episcopal Church.

The most common words associated with money were cash, security and the realization that money is a necessity. However, other important associations included resources, power and wealth as well as save/saving and give/giving. These words proved to be important guideposts, as they were often prominent concepts within participants' subsequent responses.

Family (of origin) members appear to have had the greatest impact on participants' relationships with money. Respondents recalled learning lessons about how to earn, budget, responsibly spend and unselfishly give to others. Moreover, most respondents indicated that money allows them the freedom of choice in how to live into God's calling, which was manifest in three primary ways—becoming educated and/or modifying one's career, giving to others and serving God through the Church/church. However, this calling is often achieved only after attending to individual and familial basic needs.

While money has afforded respondents many opportunities, it has also served as a barrier that has precluded them from achieving their full potentiality. Many respondents indicated that money has produced obstacles that mitigate or prevent them from living God's purpose. More specifically, the realities of living within a culture (the U.S., in particular) that highly values income and wealth, and therefore fosters a need to follow and collect money for fear of scarcity and/or decline, reduces the amount and the frequency with which individuals give charitably—including to causes and institutions that implement God's work.

When detailing what they wished others knew about money, respondents indicated that money does not belong to humans; it belongs to God and it is a tool to share through doing His work. Participants also remarked that money should be recognized as one approach in supporting the church—but not the only approach, because the best use of money was when it was given alongside other resources, such as time and talent, which were viewed as equally valuable. Participants also stressed the importance of recognizing that money is in abundance, although it is often impermanent. Therefore, attention should be paid to budgeting, saving, circulating and building relationships with it, as that is the pathway to yield the most powerful outcomes.

Giving, for most participants began when they were children and was learned through discussions with or modeling by their parents; and, earliest experiences with giving was at church—both through Sunday offering and tithing. Giving in these ways taught most respondents the joy of giving freely and that generosity in any way is a means of giving to God—particularly when contributing to the needs of others, especially those individuals or groups that had less than they. Giving is a

privilege and most participants indicated that they attempt to continually give more each time they are called to do so.

Many participants shared two common recollections from their earliest experiences of asking for a gift. First, they were taught and subsequently believe gifts should be given freely by the benefactor, and if something was requested, then it was not truly a gift. Secondly, respondents learned to place importance on understanding the recipient's gift preference(s) instead of assuming knowledge of what would be the most appreciated by the beneficiary. In addition, if they did ask for gifts, many participants indicated that often their requests were denied or reduced in scope because they were deemed undeserving. The result was increased hesitation to ask for gifts in the future. While these realities have occasionally made requesting gifts now more difficult, in combination, these experiences appear to have resulted in participants being more generous and increasingly willing to ask others to give/for gifts. Additionally, respondents indicated they have been more likely to give a gift before being asked for it. Moreover, respondents indicated that asking for gifts to help others (e.g., not themselves) significantly mitigates, even eliminates the burden and difficulty in asking, and inspires a joy in giving and pure generosity. Finally, participants recognized these ideologies represent the magnitude of relationships and companionship cultivated through giving.

With few exceptions, most participants readily shared scriptures that came to mind when talking about money. The most commonly used texts were The Widow's Mite and The Eye of the Needle, followed by For Where Your Treasure Is, There Will Your Heart be Also and For the Love of Money Is a Root of All Kinds of Evil. Other scripture cited included To Whom Much is Given, Much Will be Required; No One Can Serve Two Masters. Either You Will Hate the One and Love the Other, or You Will be Devoted to the One and Despise the Other. You Cannot Serve Both God and Money; Lay Not up for Yourselves Treasures Upon Earth, Where Moth and Rust Doth Corrupt; and, Jubilee.

Most respondents indicated that they did not or "usually" did not pray for money. However, among the respondents who indicated they prayed about money, even occasionally, the most commonly referred to reasons included guided stewardship—that is requesting assistance for directed and increased generosity to serve others who were experiencing less fortune, family members and less commonly, their parish. Participants commonly also offered prayers to give thanks for their favorable financial situations. Other respondents indicated that they engaged in prayer to ask for continued sufficiency (non-scarcity) and/or to request reprieve from the anxiety that accompanies such concern(s). Very few participants noted that they specifically prayed for (more) money.

Finally, more frequently than not, respondents stated that their faith community rarely, if ever discussed money. When the topic was broached, most commonly it was generally in terms of stewardship—in relationship to stewardship and annual campaigns, specifically. Among faith communities that rarely talked about money, respondents revealed that the conversations were commonly cloaked in secrecy and couched within the context of scarcity. Conversely, respondents who indicated their faith communities did discuss money, asserted that the conversations were

presented openly and were situated in frameworks of abundance and spiritual discipleship. Moreover, some respondents, irrespective of whether their faith communities discussed money or not, inquired why priests/rectors should be responsible for instigating and sustaining conversations about money, with a recognition that many clergy are not adequately skilled (e.g., are not educated about fundraising while in seminary) or do not have the appropriate personality (e.g., being more introspective and introverted and often uncomfortable with) to introduce and lead such discussions and related efforts, and therefore, may not be the appropriate individuals for this task.

Proposed resolutions

A070 Creating an Online Stewardship Collaborative

Resolved, The House of _____ concurring, That the 80th General Convention create an online collaborative of stewardship resources between Project Resource (a collaborative cooperative stewardship program co-created by The College of Bishops, The Development Office, and The Episcopal Church Foundation), The Episcopal Network of Stewardship (TENS), and The Office of Ethnic Ministries; and be it further

Resolved, That the collaborative expand existing offerings by facilitating the creation of stewardship materials by people of color and the development of online courses and virtual workshops on topics such as post-pandemic congregational stewardship and culturally appropriate theologies of giving in English, Spanish, and other languages; and be it further

Resolved, That the collaborative develop culturally and racially informed education materials for all candidates for holy orders on stewardship and the theology of money in English and in Spanish; and be it further

Resolved, That \$150,000 be budgeted for the work of the collaborative over the next triennium.

EXPLANATION

The Task Force on the Theology of Money has noted the profound disconnect between our theology of money and our giving as Episcopalians. Moreover, there is a widespread reluctance in congregations to even address serious matters of stewardship formation and responsible investment, yet parishioners are asking for resources to help them make faith-based decisions for their congregations and for themselves. The desire and tools are there, but the coordination of the Church's stewardship resources is not.

We have also found that stewardship resources are typically created for and by members of white, dominant-culture settings. These resources fail to take into account financial wisdom, stewardship

practices, and theological frameworks for understanding money that are shaped by and drawn out of non-white cultures and communities. Our work indicates that diverse resources for the development of these materials exist but would be strengthened through collaboration.

Measurables & Time Frame

The funding we propose would allow the coalition to create a clearing house for stewardship resources easily accessible online to all in the church. The website would provide, among other things, a highly visible virtual archive for related documents, a channel for live and recorded seminars and workshops, and a 24/7 forum for leaders of the church entrusted with stewardship issues on which they could share their questions and ideas.

This will also be available to give seminarians, those preparing for ordination, and those called to leadership positions in stewardship efforts a course-delivery platform for their education. In addition, it would help implement the call for increased training for those preparing for ordination in stewardship training.

This also saves the expense of funding a full-time stewardship officer for the Church. The advantage of working within existing organizations is the ability to create lean, cost-effective models of implementation. For example, the effectiveness of online communication has been widely demonstrated during the pandemic.

Finally, and most importantly, this funding would support the first-ever creation of resources in our Church for Christian communities of color as well as ongoing training throughout the year.

- An online platform will be created by representatives from each member of the coalition in Year 1
- Stewardship professionals of color will be hired to write curricula and provide trainings through Project Resource in Year 2
- Stewardship professionals of color will be hired to write stewardship bundles and annual programs to be distributed through TENS in Year 2
- Project Resource faculty will expand their training to include at least two-thirds of the dioceses across the Church in Year 3 (currently, over one-half have been trained)
- All candidates for holy orders will receive training and resources in stewardship and the theology of money in Year 3

A071 Amend Canons III.6.5, III.8.5, and III.10.1

Resolved, The House of ____ concurring, That the 80th General Convention, in support of the canonical requirement of rectors and priests-in-charge to ensure that all persons in their charge are instructed concerning Christian stewardship, amend Canon III.6.5.g as follows:

Can.III.6

Sec. 5. Preparation for Ordination

g. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
4. the Church's teaching on racism.
5. *Stewardship and the Church's theology of money.*

And be it further

Resolved, that Canon III.8.5.h be amended to as follows:

Can.III.8

Sec. 5. Preparation for Ordination

h. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.
4. the Church's teaching on racism.
5. *Stewardship and the Church's theology of money.*

And be it further

Resolved, that Canon III.10.1.c be amended to as follows:

Can.III.10

Sec. 1. Prior to reception or ordination, the following must be provided

c. evidence of training regarding

1. prevention of sexual misconduct.
2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
4. training regarding the Church's teaching on racism.
5. *Stewardship and the Church's theology of money.*

And be it further

Resolved, that such training shall be made available to all persons in this Church, both lay and ordained.

EXPLANATION

Canon III.9.6.b.2 assigns rectors and priests-in-charge the duty of ensuring that all persons in their charge are instructed concerning Christian stewardship. The ministry of deacons often involves the allocation of resources, a responsibility which should be informed by a Christian theology of money. Clergy of this Church, whether deacon or priest, often lack an understanding of stewardship and the theology of money which would enable them to fulfill their duties of stewardship education and the responsible use of God's gifts. In other words, we make clergy responsible for stewardship education but give them no tools with which to do it. This resolution would address this problem by requiring formation for all candidates for ordained ministry in the theology of money and stewardship. This training would be available to all members of this Church, much as anti-racism training is required for certain leadership roles yet may be taken by any Episcopalian.

A072 Commending Episcopal Examples of Responsible Investing

Resolved, the House of ____ concurring, That the 80th General Convention give thanks for and affirm the work and witness of these fifteen institutions as faithful and responsible investors and commend them to institutional investors across the Church as examples of how faithful and responsible investing can be done: Episcopal Relief and Development; All Saints Church, Pasadena, CA; The Episcopal Church of the Ascension, Hickory, NC; St. Bartholomew's Episcopal Church, Baltimore, MD; St. James Episcopal Church, Black Mountain, NC; St. Stephen's Episcopal Church, Ridgefield, CT; Trinity Episcopal Church, Indianapolis, IN; Trinity Church Wall Street, New York, NY; the Episcopal Diocese of California; the Episcopal Church in Connecticut; the Episcopal Diocese of Massachusetts; the Episcopal Diocese of Michigan; the Episcopal Diocese of New York; the Episcopal Diocese of Oregon; and the Episcopal Church in Vermont.

A073 Encouraging Faithful, Ethical, and Responsible Investing

Resolved, the House of ____ concurring, That the 80th General Convention affirm to all institutional investors in the Church the value and importance of faithful and ethical investing (defined as investing institutional assets consistently with the Church’s faith and teachings and the Church’s mission) and responsible investing (defined as addressing, ethical concerns for social, environmental and governance matters, including climate change and human rights); and be it further

Resolved, that all institutional investors in The Episcopal Church be encouraged to adopt faithful and ethical investing and responsible investing for their investment programs and portfolios and to manage their investment assets using the following elements of responsible investing: ethical and theological guidelines for investment selection and management; shareholder engagement, including voting proxies; and investing for responsible social and environmental outcomes as well as for financial return.

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Subcommittee #3
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Acknowledgements

Committee Members

Investing as Doing Theology

The wealth of the church...must be at the disposal of God and be used for godly purpose.... A new learning for me was that that's not just about how the church spends its money, but it's also about how the church invests its money. ...The reality is, you can actually accomplish social good in financially responsible ways. You just have to decide that you want to do it.

The Rt. Rev. Michael B. Curry, Bishop of the Diocese of North Carolina, discussing the decision of the Diocese to invest in Self-Help Credit Union, ENS, June 29, 2011

https://www.episcopalarchives.org/cgi-bin/ENS/ENSpress_release.pl?pr_number=062911-01

Introduction

In Resolution 2018-A061 General Convention instructed the Task Force on Theology of Money to “examine” the following three “elements of responsible investing” “practiced” “by many institutional investors across the Church”: “[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return.”

From the three “elements” identified we understand the term “responsible investing” to mean what often is called “socially responsible investing” or “socially and environmentally responsible investing,” that is, addressing, in investing, concerns for social and environmental matters. For Church institutions, responding to such concerns is grounded in the Church’s faith and teaching. Thus, examining the three elements named above is appropriate to an inquiry into theology and investing. Because Convention included all three elements, we understand Convention to use the term “responsible investing” in a broad or comprehensive sense.

The resolution gave the Task Force a specific task. The resolution directed us to look for theology of money in the practices, the *praxis*, of the Church. We were to report on what the Church does as an investor as it seeks to live into its faith, not to report on theories or abstract expressions. Thus, this report is about the Church’s practice of theology as it does investing. We can say we are reporting about *doing responsible, faithful investing as doing theology*.

In the assignment we were given no specific content for a practical theology for investing, except that those stated “elements” were, or might be, relevant. Accordingly, we sought to discover and describe what the Church is doing, now, as it invests, by asking about those elements. To us that meant we were to seek out Church investor *stories*. Our method was to ask Church institutions what they were doing as they invested and how they reflected on that. We hoped the responses would teach us something about their theology of investing – or about how they were doing theology in their investing.

Below we report fifteen stories of Church institutions – principally parishes and dioceses – investing in faith. Some stories may seem rather complex, some rather simple. In these stories other Church institutions – and, we think, individuals – may find matters to consider and apply as they undertake their own efforts at the intersection of faith and investing.

The stories demonstrate that Episcopal Church institutions in fact self-consciously invest as Church institutions guided by their understanding of their faith, and, in doing so, they practice the three elements of responsible investing identified by Convention. The stories as a group also suggest that there is a movement in the Episcopal Church for responsible, faithful investing. The movement has not been organized or directed by any Church entity or body. Nevertheless, we may say it appears institutional investors across the Church are moving with purpose along a common path, as faithful and responsible investors.

Finally, these stories show that the people who make these institutions run take seriously their responsibilities as people of faith. The people and the institutions work to be good stewards. As stewards, they seek to protect against financial loss and achieve needed financial returns. But also, as stewards, they seek to assure that the worldly wealth of the Church is used for godly purpose – that, through financially, socially and environmentally responsible investing, the Church applies its assets, in faith, to preach the Gospel.

Investing as Doing Theology

Observations

Resolved, with regards to investment beliefs, that the Task Force should examine the following elements of responsible investing consistent with the Church's faith and mission as practiced today by many institutional investors across the Church: [1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return.

Resolution 2018-A061

A movement in the Church

The charge given to the Task Force suggests General Convention sensed *a movement in the Church* for faithful investing. Such a perception may be correct. At least fifteen investors are moving along a path to engage in investing based in the Church's faith. Almost all these institutions follow approaches that encompass all three of the "elements" of responsible investing identified in Resolution A061: "[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return."

Until we collected these stories, we knew little of the scope of faithful investing by parishes and dioceses. Those we spoke with also seem to have known little about the others. Yet they share a commitment to investing faithfully and responsibly as institutions of the Episcopal Church.

Terms

In this report, "faithful investing" means seeking to follow one's faith as one invests. "Ethical investing" means applying ethical values. "Responsible investing" means addressing concerns for environmental and social matters when investing. In the last two decades, responsible investing has embraced using *environmental, social and governance (ESG)* analysis along with financial analysis in investing programs and decisions. Some suggest ESG is "value-free"; others say ESG brings non-financial values into investing. For both faithful investors and ethical investors, doing responsible investing or applying ESG necessarily leads them to apply their own values to investment decisions, whether those values are based in faith or not.

These stories are new

Ten or even five years ago, this report could not have been written. Almost all the institutions discussed here developed their faithful investing programs in the last decade. Most have reached significant implementation just in the last two or three years.

How many more stories are there? How did we find these stories?

We do not know how many Church institutional investors have been applying their faith in their investing. As far as we know, no Church body assembles and makes available information on investing by dioceses and parishes. Here we report on investors we found that had stories we thought could and should be shared.

We spoke with more than twice as many investors as we identify in this report. Some not discussed here may develop stories that can be shared. On the whole, those with stories we could tell had greater resources, in financial and human capital, than the others we have not discussed. Below we suggest the Church could make advice and support available to investors to help them, whatever their resources, to adopt and carry out faithful, responsible investing.

We found the investors we interviewed by direct contact, usually through prior knowledge or leads from others. The CEEP Network (Consortium of Endowed Episcopal Parishes or CEEP) has a few hundred endowed members. CEEP enabled a Task Force member to attend its 2020 Annual Gathering. The Task Force member was able to join a number of workshops and small group sessions on investing endowments and engage with about two dozen CEEP members. Interviews with two CEEP members also were facilitated by the Church Investment Group, a not for profit investment manager serving institutional investors related to TEC, including some CEEP members. Through these encounters we found six of the investors whose stories we tell. Task Force members knew five other investors directly or through personal contacts. We found Episcopal Relief and Development by a “cold” email inquiry. We were able to approach the remaining three investors whose stories we tell through the good offices of Amy Domini, a well-known responsible investing pioneer and a faithful Episcopalian.

We wrote up the stories, based on interviews and documents provided by the institutions, but each was reviewed and approved for inclusion in this report by the institution whose story it is.

How much of their assets do these investors commit?

All the institutions whose stories are set out below commit substantial assets to faithful investing, but the dioceses have acted differently from the congregations and parishes. All but one of the parishes and congregations have committed all their investment assets to responsible investing and substantially implemented their commitment. In contrast, only one diocese, the Diocese of New York, has committed all its investment assets, including those of its Diocesan Investment Trust, to faithful, responsible investing and fully implemented the commitment. Another, the Episcopal Church in Vermont, has adopted affirmative principles for all its assets and is working on implementing them. The Diocese of California invests all its assets with DFMS. The Diocese of Michigan invests all its assets passively, using only negative screens, which, however, in fact leads to some affirmative responsible investing outcomes. The other dioceses have committed a fraction but not all of their assets to responsible investing.

Who guides investment decisions?

All these Church institutions are guided and led by their clergy and their volunteer vestry, board and investment committee members. They receive investment services from outside investment advisors and managers, specialized consultants, and Outsourced Chief Investment Officers (OCIOs). An OCIO usually is an outside organization to which an asset-owner delegates management responsibility. Asset-owners define investment objectives and oversee the OCIO's performance, while the OCIO commonly helps choose the means to achieve objectives and executes the program. The amount of discretion delegated to an OCIO can vary.

Trinity Church Wall Street has an in-house Chief Investment Officer (CIO). A CIO is a corporate or institutional officer engaged to exercise high level executive responsibility in creating and managing an institution's portfolio(s). Before establishing its responsible investing program, Trinity engaged its CIO specifically to work with the investment committee, vestry and other leaders to create and then execute the program.

Community Investing, Impact Investing and the SDGs

The three "elements" named by Convention for us to examine are set out above. The third is *investing for responsible social and environmental outcomes as well as financial return*. Two terms commonly used for this sort of investing are "community investing" and "impact investing." Community investing involves investing at community scale, often through community development financial institutions. Impact investing involves larger scale and larger amounts, often through private capital arrangements with pools of millions of dollars.

The United Nations Sustainable Development Goals (SDGs) provide a framework that ethical investors can use, if they wish, to help guide their community investing and impact investing. Most think of the developing world when considering the SDGs, but the SDGs have a global reach: in the developed world, including the United States, much work remains to be done to achieve the SDGs. In 2015 the General Assembly adopted the SDGs, and in 2018 General Convention endorsed them. Convention asked Church institutions to devote 0.07% of their budgets to support the SDGs. As noted in its story below, the Diocese of Oregon allocates 0.7% of its responsible investing *portfolio* to investments in support of the SDGs. See the *Afterword*.

Three parishes and three dioceses discussed below began responsible investing through community investments outside their investment portfolios as such. Often, they provided capital for people in developing countries, whether or not they focused on the SDGs. The story of St. Stephen's Church, below, shows that: through a parish program, its youth did community investing by making microloans to people in developing countries to help them finance small businesses. The youth did the work and put up some of their own money, to which the vestry added more. Soon St. Stephen's leaders saw the youth had a lesson for the adults: their

investing was consistent with parish values. The leaders decided the parish should follow suit *but apply responsible investing consistent with parish values to the entire portfolio.*

Episcopal Relief and Development itself does only community or impact investing and uses only program assets, not permanent investment assets. The organization increasingly focuses its programmatic investments on supporting the SDGs. The organization understands that achieving the SDGs will require amounts of capital too large to be delivered through traditional grants. Instead, the development community needs to recruit investments from investors seeking *to profit from* achieving the SDGs. Such efforts could open up opportunities for Church institutions to join with for-profit investors to make substantial impact investments to achieve the SDGs and also obtain potentially substantial financial returns. Yet all investments to achieve the SDGs will need to take into account global climate change.

What about ESG?

As their stories demonstrate, almost all the parishes and dioceses discussed here have adopted responsible investing and applying analysis of *environmental, social and governance (ESG)* factors for themselves, although not all in the same way. Among the parishes, especially, the size of endowments and the resources available for managing them vary considerably. The range of investments chosen runs from products available widely at retail, such as mutual funds and Exchange Traded Funds (ETFs), to private capital. (ETFs are funds that allow investors to trade in mutual funds in the market, rather than having to deal always with the mutual fund sponsor/manager.) All these investments can be used for responsible investing using ESG.

“ESG” has become something of a buzz word, but the term has genuine content. There are very good reasons, financial *and* nonfinancial, to consider environmental, social and governance factors in investing. Using ESG exposes risks and opportunities with financial and other implications that traditional financial analysis can miss. As responsible investing has grown in scale and importance, substantial numbers of investors and investment practitioners have committed to applying ESG, because they believe this is the wise and prudent course for stewards of institutional assets. All ESG investors do not end up with the same portfolio or results. They apply these factors along with financial analysis and judge success not just on financial return but also on ESG outcomes. See *Principles for Responsible Investment*, below.

Moreover, increasing awareness in the last decades that global warming, if unchecked, could lead to devastating disruptions to human life has helped convert more participants in the capital markets, who traditionally have focused solely on financial factors, to begin to use ESG. ESG is not universally received wisdom, but fear of climate change has drawn ESG into the capitalist mainstream. In the September 27, 2020, *New York Times*, Allison Herren Lee, a Commissioner of the Securities and Exchange Commission, wrote as follows:

One prominent outdated notion is that investments made on the basis of environmental, social and governance risks — known in the industry as E.S.G. — are merely about one’s policy preferences or moral choices. That might have been closer to reality over a decade ago, but as E.S.G. investing has grown and matured, so too has an understanding of its value.

Today, lenders, credit rating agencies, analysts, stock exchanges and asset managers representing trillions in investments use E.S.G. as a significant driver in capital allocation, pricing and value assessments. A major study recently found that a large number of powerful institutional investors rank “climate risk disclosures” as being just as important in their decision-making processes as traditional financial statements and other metrics for an investment’s performance — like return on equity or earnings volatility.

Researchers at the Bank of International Settlements have called climate change “a colossal and potentially irreversible risk of staggering complexity.” It is a systemic risk that will threaten global financial stability and spare no corner of the earth: Health, food security and water supplies across the globe will be disrupted.

<https://www.nytimes.com/2020/09/27/opinion/climate-change-us-companies.html>

Moreover, the Federal Reserve recently has joined other central banks in acknowledging the potential for climate change risk to disrupt financial systems. In its half-yearly *Financial Stability Report* issued on November 9, 2020, the Federal Reserve noted that “[p]romoting financial stability is a key element in meeting the Federal Reserve’s dual mandate for monetary policy regarding full employment and stable prices.” Then, for the first time in history, the Federal Reserve stated in that same *Report* that climate change can pose a risk to financial stability:

The Federal Reserve is evaluating and investing in ways to deepen its understanding of the full scope of implications of climate change for markets, financial exposures, and interconnections between markets and financial institutions. It will monitor and assess the financial system for vulnerabilities related to climate change through its financial stability framework. Moreover, Federal Reserve supervisors expect banks to have systems in place that appropriately identify, measure, control, and monitor all of their material risks, which for many banks are likely to extend to climate risks.

<https://www.federalreserve.gov/publications/2020-november-financial-stability-report-purpose.htm>

This *Report* does not announce that the Fed has converted to ESG but understanding the risks climate change poses to financial stability will require some application of ESG. ESG clearly is gaining adherents. And, while using ESG may not yet be universal practice, every investment professional seems to offer ESG services. There may be almost as many ESG approaches as investors trying to use ESG or advisors trying to sell ESG.

Some assert ESG does not yield ethical guidance. One observer has said ESG can find the most environmentally clean, socially responsible and best run oil company, but it will still be an oil

company. Others assert that raising questions about environmental, social and governance factors, especially ESG opportunities and risks, necessarily leads to making value judgments about companies and their policies and practices. Such a debate about ESG need not detain Church investors long. Church institutions are guided by values, and when they act as investors, there is no reason they cannot bring their Church values to bear, whatever a specific investment analysis (ESG or not) may suggest. Moreover, through using ESG a Church investor may be able to sharpen its understanding of how to apply its values in the investment context.

Principles for Responsible Investment

The Principles for Responsible Investment (PRI) are built on ESG. In response to a call by the UN General Secretary, institutional investors launched PRI in 2006. PRI describes itself as “the world’s leading proponent of responsible investment,” with over 3,000 signatories, of which over 500 are asset owners that hold total assets exceeding \$100 trillion. PRI is a prime example of what the industry calls a “stewardship code,” or voluntary compact to promote responsible investing. Observers question how effectively such codes of conduct, especially those with many signatories, can guide behavior. PRI and other such codes certainly are aspirational.

Signatories to the PRI commit to the six Principles for Responsible Investment, including to incorporate ESG into their investment analysis, decision-making and policies and practices, and to promote ESG and the Principles. Signatories also are required to complete a detailed report annually on their application of the Principles and ESG. Some signatories find this requirement onerous, but observers see it as a useful means to make the Principles work.

Practical Church Guidance

A number of Episcopal Church institutional investors we interviewed told us that they had to work out their own approaches to affirmative responsible investing without practical guidance from any denominational body or authority. They looked for but could not find information from the denomination on the “nuts and bolts” of such investing. Some, but not all, of these were less well-resourced investors who have not yet developed stories we could tell.

On the other hand, one diocese whose story we do tell below made personal contact, by some persistence, with DFMS staff and CCSR members. Over some weeks, this diocese directly sought, and received, advice and suggestions on how to do affirmative as well as negative responsible investing. The diocese’s team was able to get answers to their questions. Perhaps we should expect that dioceses and parishes generally will persevere until they get help, but the larger Church could make access to such information and counsel more readily available.

What are Episcopal values?

The Episcopal Church in Connecticut declares its Values Fund is managed to “reflect the values of the Episcopal Church in areas of environmental stewardship, social responsibility and corporate governance (‘ESG’ Performance).”

As we listened to leaders of institutional investors in the Church, we frequently heard the term “Episcopal values.” Often, too, we were asked “what are Episcopal values?” Sometimes those very words were used, sometimes the question was stated differently. However, they phrased it, institutional leaders wanted to know what values Episcopal Church institutions should apply in investing. They were asking for help in developing a theology of investing. Again, some, but not all, asking “what are Episcopal values” were among the less well-resourced investors.

Almost all these institutional investors were aware of the exclusion policies/negative screens that have been mandated for DFMS – and recommended for the Church at large – by Convention and Council over the last decades. They found those negative screens (or no-buy lists) on DFMS’s website. They valued this negative policy guidance, and many adopted it.

What they did not find was guidance from the Church on what “Episcopal values” to apply when making affirmative or positive investment decisions, rather than excluding or divesting investments. They did not find advice to parishes and dioceses on discerning what the Church’s faith said about questions of investing that were not covered by existing negative screens.

Clearly the Church has “values,” and the Church speaks and acts on them. The Church has recommended divestment as the appropriate response in faith to a handful of investment issues. However, the Church now lacks an organized means to help Church investors draw out more affirmative implications of the values expressed in the Church’s faith and teachings. Church investors would benefit if the Church had such means.

The institutions whose stories we tell in this report did not stop because they could not find denominational guidance on “Episcopal values.” They acted, in faith, to develop their own expressions or understandings of positive values for investing. To do this, these parish churches and dioceses, and Episcopal Relief and Development, themselves drew on scripture, the Church’s teachings and their own reading of Church policy statements.

Three of the dioceses received proposals in diocesan convention that focused on fossil fuel divestment. Drawing on volunteer and professional expertise within the diocese and applying their understanding of the Church’s ethical teachings as well as of responsible investing, these dioceses were able to develop statements of values to support *affirmative* responsible investment policies. Then they were able to build consensus, often through formal convention action, for diocesan investing based on these values, using ESG. The results – their “own” theologies for investing – now will support negative decisions, to divest to avoid harms, as well as affirmative decisions to invest for positive social and environmental outcomes.

Four parishes completed a congregational planning process before addressing responsible investing and ESG. Typically, members of a congregation would work together to define a parish's vision, mission and values based on scripture and the Church's teachings. Having established a congregational consensus on values, these parishes then undertook a further step. Often aided by expert members of the congregation, they worked to apply parish values affirmatively to their portfolios, through adopting responsible investing using ESG. Self-consciously they made investment policy based on the values they had recently identified.

Instances drawn from some of the stories may be instructive.

To define its values **Trinity Church Wall Street** turned to well-established Episcopal Church resources. Through a parish strategic planning process Trinity identified its six core values, defining them by reference to scripture and the Baptismal Covenant. For example, Trinity Wall Street defined one of these – *inclusiveness* – in part as follows:

There is neither Jew nor Greek, there is neither slave nor free, there is neither male nor female; for you are all one in Christ Jesus. – Galatians 3:28

We will embrace diversity and will respect the dignity of every human being.

At Trinity Church Wall Street, all are welcome. We seek to honor the God-given dignity and learn from the experience of every human being.

After identifying its six core values, Trinity turned to applying them affirmatively to its investments. The Trinity investment committee concluded that responsible investing would provide the framework for the investment team to evaluate investment opportunities *through the lens of Trinity's core values*, such as *inclusiveness*. The committee prepared a new Investment Policy Statement (IPS) embodying its conclusions, and the vestry approved the IPS. Following vestry approval, Trinity's policy has been that all investments in the diversified portfolio are to be made consistent with principles of responsible investing, *in light of Trinity's core values* and in support of Trinity's strategic imperatives/areas of strategic focus.

In its Diocesan Convention the **Diocese of Oregon** received a proposal to divest from fossil fuels. Instead of voting whether or not to divest, the Convention and Diocesan leadership developed a proposal including a request to Convention delegates to choose ethical values for investing. Then the Diocese would build a portfolio to apply the chosen values.

The Diocese asked Diocesan Convention delegates to place dots on a display board to indicate their positive *and* negative *socially responsible investing and gospel values priorities* (SRI/Gospel value priorities) among multiple possibilities identified on the display board. After further work, the Convention approved a new diocesan socially responsible investing fund (SRIF) for parishes and other institutions in the Diocese. Convention also established a Stakeholder Advisory Committee (SAC) to help set up the SRIF and to connect investors and others with it.

Then the Diocesan investment committee and the SAC, with a consultant, used the delegates' SRI/Gospel value priorities to design and construct a portfolio for the SRIF that met the affirmative socially responsible investment priorities of the delegates and avoided what the delegates sought to avoid. They also worked to explain the portfolio they had crafted and the choices they made to realize the values Convention delegates chose. Since the SRIF has been up and running, the SAC and the investment committee have continued to work with investing parishes and others in the Diocese to assure the SRIF reflects the Gospel value choices of Convention delegates and also achieves the financial and socially responsible results intended.

Like Trinity Wall Street, **Trinity Church, Indianapolis** first set out to articulate its mission priorities and then identified how its endowment might be invested in support of each of those priorities and in alignment with the parish's values. In its new Investment Policy Statement (IPS) Trinity Indy stated its purpose clearly:

Ethical investment considerations form an integral part of Trinity Church's mission and witness. Through a faith-based investment policy, Trinity Church seeks a constructive engagement with the corporate world in order that responsible environmental and business practices and high standards of corporate behavior are encouraged and supported An important component of an ethical investment policy is the use of positive ethical criteria in assessing companies.

Consistent with the description two pages above, Trinity Indy did not find positive ethical criteria (that is, guidance on "Episcopal values") available from the Episcopal Church. Instead, Trinity turned to the Church of England. Trinity Indy's IPS adopts positive criteria developed by that Church's *Ethical Investment Advisory Group (EIAG)*, summarized in Trinity's IPS as follows:

- Responsible employment practices
- Best corporate governance practices
- Conscientiousness regarding human rights
- Sustainable environmental practices
- Sensitivity toward the communities in which businesses operate

According to the Church of England, "the purpose of the EIAG is to enable [the investors the EIAG advises] *to act as distinctively Christian – and Anglican – institutional investors*. [Emphasis supplied] The EIAG develops ethical investment policy recommendations which, once agreed by the [institutions it advises], are adopted by them, communicated to the wider Church and implemented." More on the Church of England is found in the Context section of this report.

The two parishes and one diocese discussed immediately above, and others in our study, demonstrated independence of spirit and creativity in finding, without denominational guidance on "Episcopal values," their own ways to an affirmative investment policy grounded in their understanding of the Gospel and the Church's teachings. However, the Church could do

more to support parishes and dioceses as they seek to be affirmative as well as negative investors of faith. The Trinity Indy story suggests we might learn from the Church of England.

Church institutional investors by definition have assets to invest, but all are not alike. Few investors have available the human and financial capital that Trinity Indy has, not to mention Trinity Wall Street. The whole Church could help individual institutional investors become better, more faithful and more responsible investors. As their stories show, the parishes and dioceses discussed here have developed expertise in faithful, responsible, affirmative investing. They could apply their experience to help the Church support other Church investors.

Drawing on the experience of these dioceses and parishes, the Church could devise means to help investors in the two ways the above account suggests it has not. First, the Church, as the Church, could make “ethical investment policy recommendations” to investors that reflect affirmative “Episcopal values.” Second, the Church could give practical support for applying those recommendations. Providing recommendations on the principles to apply and guidance for applying them could yield real support for institutions seeking to invest responsibly and faithfully. In short, the Church could help its institutions to use faithful, responsible investing both to achieve positive ethical outcomes and to take stands against harmful policies and practices, while prudently achieving financial returns needed to support the Church’s mission.

Recommendations

We make the following recommendations:

(1) We recommend that General Convention give thanks for and affirm the work and witness of these fifteen institutions as faithful and responsible investors, and commend them to institutional investors across the Church as examples of how faithful and responsible investing can be done: Episcopal Relief and Development; All Saints Church, Pasadena; The Episcopal Church of the Ascension, Hickory, North Carolina; St. Bartholomew's Episcopal Church, Baltimore; St. James Episcopal Church, Black Mountain, North Carolina; St. Stephen's Episcopal Church of Ridgefield, Connecticut; Trinity Episcopal Church, Indianapolis; Trinity Church Wall Street; Episcopal Diocese of California; Episcopal Church in Connecticut; Episcopal Diocese of Massachusetts; Episcopal Diocese of Michigan; Episcopal Diocese of New York; Episcopal Diocese of Oregon; and the Episcopal Church in Vermont.

(2) We recommend that General Convention affirm to all institutional investors in the Church the value and importance of faithful investing (defined as investing institutional assets consistently with the Church's faith and teachings and the Church's mission) and of responsible investing (defined as addressing ethical concerns for social, environmental and governance matters (ESG), including climate change and human rights).

We further recommend that Convention recommend that all institutional investors in the Episcopal Church consider adopting faithful investing and responsible investing for their investment programs and portfolios and managing their investment assets using the following elements of responsible investing: applying ethical and theological guidelines, including ESG, in investment selection and management; shareholder engagement, including voting proxies; and investing for responsible social and environmental outcomes as well as for financial return.

Note: to give an overview, at the top of each story appear four headings. These identify the three elements General Convention assigned to be examined – “[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return” – plus ESG, because ESG is often used to implement guidelines.

Stories

Episcopal Relief and Development

Investing as program yields program results and financial returns to support additional program

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	DFMS	DFMS	Yes

Lord, when was it that we saw you hungry and gave you food? we saw you thirsty and gave you something to drink? we saw you a stranger and welcomed you? we saw you sick and took care of you? we saw you in prison and visited you?

“Truly I tell you, just as you did it to one of the least of these, you did it to me.”

Matthew 25:37-40 (NRSV)

Background

In 1940, the National Council (the Executive Council under its former name) directed the formation within the Church of the Presiding Bishop’s Fund for World Relief (PB Fund) to support and carry out war relief. Initially, the PB Fund assisted refugees and, after the conflict ended, helped re-build Anglican institutions damaged in World War II. Then the PB Fund expanded its mission to support humanitarian aid worldwide, including at home in the United States. The PB Fund provided disaster relief, and rehabilitation and development assistance, and continued to support resettlement of refugees in the United States.

Through the next decades the needs for refugee resettlement, disaster relief and development aid all increased, and the PB Fund expanded its efforts, with the support of donors across the Church. In 1988 Episcopal Migration Ministries became an independent organization to support refugee resettlement, while the PB Fund concentrated on relief and development.

In 2000 the PB Fund was renamed *Episcopal Relief and Development*, to reflect its two main efforts, while continuing as a Church program. *In 2001, the organization for the first time supported a microcredit program as part of disaster recovery and development work in Belize.* In 2002, Episcopal Relief and Development (Episcopal Relief & Development) was separately incorporated and received recognition from the Internal Revenue Service as a tax-exempt charitable organization. As an independent entity, Episcopal Relief & Development continues to be closely affiliated with The Episcopal Church, as *TEC’s* relief and development organization.

Episcopal Relief & Development holds trust funds currently valued at approximately \$20 million. These trust funds are held and managed for Episcopal Relief & Development by The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (DFMS), the corporate entity holding and managing investment assets for The

Episcopal Church as a denomination. As well as holding and investing assets for itself, DFMS, in a manner similar to that of a mutual fund, holds, in a custodial relationship, and invests assets for numerous entities related to TEC, including Episcopal Relief & Development.

In addition to its trust funds, Episcopal Relief & Development has other financial assets that it invests for itself. These are program assets, *used programmatically as investments* for economic development and recovery. Investing these assets is the subject of this discussion.

From the beginning Episcopal Relief & Development's principal tool for supporting and guiding both disaster recovery and economic development has been making grants to be expended by partner organizations working in communities, in the U.S. or abroad, that need aid. Along with grants, the organization has provided training and technical support to help grow local capacity.

Today, grants, with training and support, continue to be Episcopal Relief & Development's main tools for disaster relief, recovery and development. However, as noted above, in 2001 the organization first used microcredit to support recovery and development work, and the use of such programmatic investing has increased down to the present.

Episcopal Relief & Development Programmatic Investing

Since its first microlending effort in Belize in 2001, Episcopal Relief & Development has gained experience *using investments programmatically* (programmatic investing or investments as programs) both in the United States and across the globe. The organization has learned that, in some contexts, such investing, through the use of financial tools such as guarantees, fund capitalization, loans, and equity investments, can help leverage and expand resources available for community development on the ground much more than donor grants could do alone.

Following Hurricane Katrina, Episcopal Relief & Development worked with local partners in the U.S., including the Diocese of Mississippi and Hope Community Credit Union, to use Episcopal Relief & Development financial assets to support and structure a housing loan guarantee fund. Episcopal Relief & Development's commitment of capital helped create a pool to support second mortgages for 250 homeowners living below the poverty line on the Gulf Coast of Mississippi, enabling them to rebuild their homes.

From the beginning Episcopal Relief & Development has emphasized support for local microfinance programs in its efforts to supply capital beyond what is possible through grant-making. The organization has found that microfinance lending leads to asset growth primarily in communities where people are also saving.

This learning led Episcopal Relief & Development, at the beginning of the second decade of the 21st Century, to launch a program with partners in 16 countries that combined training in savings with increased access to lending capital for women living on under \$2 a day. Over seven years, the organization "invested" around \$2 million in grants for training and facilitation and

provided an additional \$2 million in loan capital for revolving funds. These programs enabled its partners to provide credit in their own communities. During the period Episcopal Relief & Development and its partners helped in the formation of nearly 2,500 Savings Groups with over 52,000 members across those countries. The participants, nearly all women, saved more than \$8 million in their own capital as part of the program and loaned more than \$5 million from their own savings in mutual support to one another, in addition to what Episcopal Relief & Development provided. After the end of the organization's direct engagement in the effort, the collective funds have continued to revolve in the participants' communities.

In addition to its work with savings groups and loan circles, Episcopal Relief & Development has gained experience with a "pay it forward" fund working between "receivers" and "givers" in community. The organization, with other grantors, has supported the ECARE program managed by the Episcopal Church of the Philippines. In such a "pay it forward" arrangement, a "loan" recipient does not pay "back" the amount of the "loan" to a "lender," but passes it "forward" to another recipient/borrower, who is expected, in turn, to pay "forward" the "loan" to another recipient, who is expected to continue passing the "loan" assets forward, and so on.

Drawing on all these experiences since 2001, in November 2016 the Board of Directors of Episcopal Relief & Development adopted a new strategic plan for 2017-2021, for "unlocking abundance," with one objective to launch and learn from at least three additional programmatic investment experiences during the period. The intention of this current work is not only to invest in loans, revolving funds and other financial inclusion activities which provide capital for the participants, but also to deepen understanding and utility with "earning" gained and returned to the organization: *how investing as program can yield financial returns which can then be reinvested for more program results without raising further donor dollars.*

In this five-year cycle the organization continues its support for savings and loan circles and also has closed a new loan in Colombia. In this transaction it has invested alongside ECLOF Colombia, a microfinance fund affiliated with the global organization ECLOF (ECLOF, formerly known as the Ecumenical Church Loan Fund, is an offshoot of the World Council of Churches). This investment, in farmers' irrigation and water system infrastructure, will not only make a needed improvement in rural livelihoods, but the principal together with nominal interest also will be returned after a time for redeployment by the ECLOF Colombia microfinance program. In addition, Episcopal Relief & Development continues its support for the ECARE "receivers to givers" program in the Philippines and is reviewing additional investments to support smallholder farmers and fishermen in both the Philippines and Sri Lanka.

Sustainable Development Goals

During this strategic plan period, Episcopal Relief & Development is seeking intentionally to learn from its past and current efforts in order to become more effective at programmatic

investing and to leverage the impact of that investing. It knows the challenges facing development organizations are growing. The organization also knows the resources that can be expected to be available to meet those challenges through traditional grant and support programs are likely to fall short. More and more, the monies available for development are expected to be a “blend” of traditional grants by aid and philanthropic organizations and *investments* by banks, financial institutions and others with assets to invest.

In September 2015 the United Nations General Assembly adopted the Sustainable Development Goals (SDGs) as successors to the earlier Millennium Development Goals (MDGs). The MDGs were adopted in 2000 with a target date for achievement of 2015; the MDGs were not achieved by that year, but that year the UN adopted the SDGs, with a target date for achievement of 2030. The General Convention endorsed the SDGs in 2018, asking that TEC institutions support achieving the SDGs by devoting 0.07% of their budgets to development.

The global development community broadly agrees that achieving the SDGs will require around \$5-7 trillion in grants, investments, and other aid be put into development by 2030. In that period, national governments, other governments, international agencies and philanthropy will provide trillions of dollars, but far less than is needed. Grants alone cannot do the job.

The logical source for the large amounts of additional capital needed would be investors seeking to profit from achieving the SDGs. In 2016 the Business and Sustainable Development Commission (BSDC) was launched under the auspices of the UN to bring together leaders from business, finance, civil society, labor, and international organizations to work together to support achieving the SDGs and to identify how businesses could contribute to that end. The BSDC estimates that achieving the SDGs could open up \$12 trillion of market opportunities in food and agriculture, cities, energy and materials, and health and well-being and create 380 million new jobs by 2030. Accordingly, the nongovernmental and philanthropic aid community wants to participate alongside for-profit companies in support of sustainable development.

Episcopal Relief & Development knows achieving the SDGs will require it and others to step beyond traditional grant-making. It believes it should help unlock funding for development and social impact by using its assets through aid efforts that “blend” philanthropy and leverage a variety of financial tools. Now Episcopal Relief & Development is seeking to learn from its two decades of programmatic investment experience, and from the experience of others, to develop more such tools for relief and development and then to use them more effectively.

Note: to give an overview, at the top of each story appear four headings. These identify the three elements General Convention assigned to be examined – “[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return” – plus ESG, because ESG is often used to implement guidelines.

Congregations and Parish Churches

All Saints Church, Pasadena

Seeking fossil fuel divestment leads to ESG investing

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

All Saints Church was organized in the 1880s and has grown substantially. Now All Saints has one of the larger congregations in Episcopal Diocese of Los Angeles and in The Episcopal Church, with about 4,000 members. For eight decades All Saints has been known to be one of the more activist congregations in TEC, deeply engaged and committed to advocating and acting for racial and social justice, for human rights and for care of creation.

For the size of its congregation, the parish has an endowment that may appear modest, amounting to about \$2.5 million. Historically, All Saints invested its assets in the Diocesan Investment Trust of the Diocese of Los Angeles. About 2010 the vestry and its investment committee began to look for alternative investment vehicles for All Saints. They hoped to enable the parish to better reflect its faith commitments in its investments, particularly by excluding fossil fuel companies from its portfolio.

In 2016 All Saints engaged the Church Investment Group (CIG) as investment manager. CIG is a not for profit investment manager that serves institutional investors related to the Episcopal Church; CIG is now a signatory of the UN Principles for Responsible Investment (PRI). In response to All Saints’ requirements, CIG created its *Fossil-Fuel Free ESG Multi-Asset Fund* (the Fund). All Saints became the first investor in the Fund in October 2016.

The Fund incorporates environmental, social and governance (ESG) factors in its security selection. The Fund takes into account “positive environmental practices, resource efficiency, sustainable business practices that include safe and supportive work environments, product and service safety, strong corporate governance, good relationships with stakeholders including employees, customers and communities and other activities that enhance the long-term sustainability of its investments.” Through ESG screening, the Fund “seeks to maximize long-term performance” and emphasize “investments with sustainable and responsible practices.”

The Fund excludes tobacco companies and “companies for which the manufacture of firearms represents at least 10% of annual revenue.” Finally, the Fund does not invest in companies with “substantial in the ground fossil fuel resources as reflected by the following MSCI sub-

industry classifications: Integrated Oil and Gas, Oil and Gas Exploration and Production, and Coal and Consumable Fuels.”

The Fund makes investments that combine responsible social and environmental outcomes with financial return. For example, through the bond portfolio in the Fund, All Saints is financing wind and solar energy, public education with University of California bonds, and job creation and economic development with the Michigan Strategic Fund. In addition, separately All Saints has funds on deposit with the Diocese of Los Angeles credit union that provide collateral for loans to documented and undocumented immigrants for payment of legal fees.

The investment committee believes the Fund meets All Saints’ needs. Committee members are pleased that the Fund provides an affirmative approach to environmental and other issues in investing. The committee is now being reconstituted to enhance the congregation’s engagement with investment issues.

The Episcopal Church of the Ascension, Hickory, North Carolina

Following Jesus’ two great commandments – and being led to ESG investing

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	No	Yes

The Episcopal Church of the Ascension was founded in 1873 in Hickory, North Carolina. Part of the Episcopal Diocese of Western North Carolina, Hickory is a small city of 40,000. For years Hickory was a center for furniture making, and that continues to be its major industry.

By its mission statement Ascension is committed “to love, think, and act as the body of Christ in the church, our community, and the world.”

Ascension has nearly 400 members and an average Sunday attendance of over 90. The parish’s annual budget is around \$500,000. The Ascension endowment has a value of about \$3 million, and the annual draw, set at 4% of a three year average rolling market value, yields about \$100,000 to support the budget. In accordance with the terms of the original gift instruments, 56% of the endowment draw is used to support outreach efforts.

In 2016 Ascension found itself looking for a new advisor for managing its endowment. In November the rector attended a program at the Diocesan Convention about responsible investing and the application of environmental, social and governance (ESG) factors in investment management. The rector was taken by the idea that, if the parish invested with social and environmental outcomes in mind, as well as financial returns, it was possible Ascension could do as much or more to support God’s kingdom through investing as it was

doing with its direct outreach. Because a portion of its endowment was given to support outreach, it seemed important for Ascension to consider how the money was invested.

The rector shared her insights with Ascension’s financial leadership. After study and discussion, the lay and clergy leaders made the decision to shift some of Ascension’s portfolio into affirmative ESG investing.

The team interviewed several candidates for investment advisor, specifically asking about their experience with and commitment to ESG investing. The team selected a local firm and asked the firm to design an approach combining two components. After the firm made its presentation to the vestry, the vestry approved the new approach.

The bulk of the endowment, 70% by value, is invested to screen out companies involved with fossil fuels, tobacco, weapons, gambling, adult entertainment, and with poor environmental records. About 8% is in mutual funds that cannot be screened. The remainder, nearly 22%, is managed for ESG outcomes by a firm committed to an active ESG program.

The *financial* effect of the new approach has been positive. Ascension’s financial advisor says “... there is ongoing debate about the impact of ESG mandates on performance. There is more and more belief that it can be done without sacrificing return. And hope that it could positively impact return. ... It will take time for these positive social and governance mandates to fully play out. But they have certainly played out positively over the last three years.”

The rector says that, in making this change, the parish was guided by its formal mission statement, to love, think, and act as the body of Christ in the church, community, and world. She adds: “We were also following Jesus’ two great commandments: to love God with all our hearts and minds, and to love our neighbor as ourselves.”

St. Bartholomew’s Episcopal Church, Baltimore

***Called to use all financial assets – including investments – as tools of mission
at the same time they yield funding for mission***

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

Background

St. Bartholomew’s Episcopal Church was formed by Whites in 1857, just before the Civil War. Maryland was a chattel slave holding state yet had a significant population of free Black people. The state remained in the Union in part due to intervention by President Lincoln. In the last century Maryland became more urban, led by the growth of Baltimore (and Washington, D.C.),

and the state became more diverse, culturally and economically. St. Bartholomew's built its current church in 1931 in a suburb within city limits. Today the parish is extremely diverse, drawing people of many backgrounds from Baltimore and the suburbs beyond.

St. Bartholomew's (St. B's) has over 300 members; its budget approaches \$600,000 annually.

Vision, Mission and Core Values

In 2005, after a year-long effort to set parish goals, the vestry adopted the following statement of St. Bartholomew's Vision, Mission, and Core Values:

Vision

We will, with God's help, be a vibrant faith community that is a blazing beacon of God's transforming love in the world.

Mission

God is calling us to take righteous risks. We accept this call, and will respond by seeking and serving Christ in all people.

Core Values

St. Bartholomew's Episcopal Church

- *places worship at our center*
- *promotes inclusivity and openness*
- *has a strong commitment to pastoral care*
- *is dedicated to education, both learning and teaching*
- *empowers the laity for leadership and ministry*
- *is deeply committed to outreach and service*

Budgeting and Investing

The St. B's annual operating budget is met through current pledges and gifts and other current revenues, not from income or other proceeds of the parish's investment assets. Each annual budget by design includes more projected expenditures than revenues; thus each has a "deficit." These annual deficits have gone as high as 15%, but usually the percentage is far smaller. Each year the parish is challenged to meet the actual monetary needs to sustain its life and mission. Historically more often than not the parish has met those needs.

Some years annual revenues have exceeded annual expenses. By policy an annual operating surplus may not be rolled over into the next year's budget but must be put into a cash reserve, so the next budget will start with a deficit. Such short-term cash reserves are then used only by specific vestry decision to fund grants for stated purposes. Grants may be made from cash reserves for mission, for improvements to parish property or to cover a prior year's unmet "deficit." Annually St. B's cash account runs in the range of \$100-150,000. Depending on the year, up to about \$50,000 of that may be short term cash reserves.

The value of St. B's long term investments has reached almost \$1 million. As noted, investment proceeds of long term investments by policy cannot be used to support the St. B's operating budget. Endowment proceeds can only be expended by specific vestry decision and solely to support grant-making. Annually, on recommendation of the Funds Committee, the vestry may grant up to one-third of the endowment draw for specific property improvements, one-third for program initiatives, and one-third for outreach opportunities.

Called to Faithful Stewardship of Financial Assets

The Funds Committee at St. B's acts as an investment committee as well as participating in grant making. The Committee includes parish members who are investment professionals.

In 2020, after months of work by the Funds Committee, on recommendation of that Committee the St. B's vestry approved a new Investment Policy Statement (IPS).

At the very top of the new IPS the vestry has placed St. B's Vision and Mission statements. Thus, the IPS immediately affirms that, in handling its assets, the parish accepts *God's call* to "take righteous risks" and to respond "by seeking and serving Christ in all people."

Right after the Vision and Mission statements, the IPS places the following:

"St. Bartholomew's Statement of Social Responsibility: St. Bartholomew's is called to exercise faithful, competent and socially responsible stewardship in how it manages its financial resources."

This statement repeats the language of "call." The statement also makes explicit that the call extends not only to St. B's investment assets but to *all* parish "financial resources." Moreover, St. B's is called to exercise *socially responsible* stewardship for all these resources.

Long before this IPS was adopted, St. B's exercised responsible stewardship in its financial operations by using banking as an instrument for mission. For years the parish has done its banking through credit unions that support community development. And St. B's has held its reserves in accounts with such credit unions.

Long term investment assets necessarily are included in the financial resources that the IPS requires to be managed faithfully, competently and with socially responsible stewardship.

In 2014, well before the new IPS was written, a member of the parish proposed to the Funds Committee that the parish consider investing a fraction of the parish's endowment responsibly, using environmental, social and governance (ESG) factors. The parish member was surprised by the committee's response. Instead of agreeing to invest a fraction of assets using ESG, the committee immediately decided to invest *all* the parish's endowment assets using ESG.

In line with that decision, in 2014 St. B's shifted its endowment fund to a customized, separately managed account (SMA) with 100% of holdings in ESG investments. The SMA is held with and managed by 1919 Investment Counsel (1919), a Baltimore based investment firm that is owned by Stifel Investment Corp. (which is based in St. Louis). 1919 also votes the proxies associated with the St. B's investment assets consistent with ESG principles. The Funds Committee oversees the performance of 1919 and its application of ESG.

The new IPS specifies that all assets are to be invested in the "SRI/ESG asset classes" listed in the IPS. The IPS provides that performance is to be measured against the following benchmarks: the MSCI KLD 400 Social Index and the Dow Jones Sustainability United States Index. St. B's assets currently are held in traditional stocks and bonds and ESG mutual funds and exchange traded funds (ETFs) and may be held in ESG alternative investments.

Community Investing

Since 2015 St. B's has allocated a portion of parish outreach program funds to micro-lending outside the United States through the web portal kiva.org. A parish team has met bimonthly to review opportunities and make loan decisions. Because the loans are paid back, the pool of capital for loans keeps growing. Lately the team has had close to \$1000 to loan at every meeting. Through these loans, St. B's has helped individuals and groups around the world create and run small businesses in trade and agriculture and improve community facilities. Given the success of the team's efforts, St. B's has begun considering developing a similar micro-lending program for neighborhoods near Saint Bartholomew's.

Investor Engagement

In 2016 St. B's met with its investment manager, 1919. At that meeting St. B's raised its concern that 1919 had not demonstrated a commitment to diversity in its Baltimore operations, something that St. B's expected of its suppliers in the community. St. B's noted that 1919's parent, Stifel Financial Corp. (Stifel), had been the recipient of a shareholder proposal from a major investment firm asking Stifel to prepare and disclose an annual diversity report on the percentage or number of women and persons of color working for Stifel in major EEOC job categories and also a description of Stifel's policies and programs focused on increasing gender and racial diversity in the workplace.

After that meeting St. B's learned that Stifel had added two women to its board. Then St. B's restated its concerns in a November 2017 letter to 1919's management and a similar letter to the CEO of Stifel. In those letters St. B's wrote:

It is essential that our investments align with our vision and practices at St. Bartholomew’s Episcopal Church. Diversity is at the core of our understanding of God, and leads our commitment to justice. We look forward to your commitment towards positive change for African-Americans and women in Baltimore, and to hearing about your platform for diversity, transparency, and social impact.

The CEO finally responded to St. B’s in March 2018 and promptly directed two senior Stifel and 1919 executives to meet with St. B’s “at the earliest mutually convenient time.”

After that meeting, Stifel/1919 told St. B’s that St. B’s had made the business case for diversity.

Since then 1919 has kept St. B’s informed of its efforts to hire women and people of color in Baltimore. Stifel has added a person of color to its board.

St. B’s believes the engagement was reasonably successful. And it was the right thing to do.

St. James Episcopal Church, Black Mountain, North Carolina

As the parish begins to address White privilege and racism, the vestry moves cash from a bank to a community development credit union

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	No	No	Yes

The first services for the congregation that became St. James Episcopal Church were held in 1907. The congregation completed its first church building in 1912. A parish of the Episcopal Diocese of Western North Carolina, St. James moved to its current site in 2000. Black Mountain is a small town of about 8,000 in Buncombe County, at the foot of the Blue Ridge Mountains. Tourism and recreation play prominent roles in the town. The population is about 90% White.

St. James has about 350 members and an average Sunday attendance of about 200. The parish’s annual budget is around \$350,000. The parish established the St. James Foundation in 2003, not to support the church’s budget, but to help the church be present to the world by making grants for religious, charitable, and educational purposes. The Foundation generally funds programs in Black Mountain and the surrounding area and supports initiatives in the Diocese of Western North Carolina. The endowment has a value of about \$500,000.

St. James traditionally has done its banking with a large commercial bank. For some time the vestry has been considering making a deposit with Self-Help Credit Union to support Self-Help’s community development lending and advocacy. The Diocese and about a dozen parishes in the Diocese have made deposits totaling over \$700,000 with Self-Help. Self-Help is member-

owned, federally-insured, and a major force for community development and economic empowerment in Western North Carolina.

On June 4, 2020, the St. James vestry met for the first time after the killing of George Floyd and the clearing of Lafayette Square of Black Lives Matter protestors to permit a photo opportunity at St. John’s Episcopal Church for the President. The vestry made the following decisions:

The vestry will disseminate the following statement on behalf of our church:

St James Episcopal Church will listen and discern ways to ally with people of color for justice. We commit to dismantling white privilege in ourselves, in our church and town, and in our world. Black lives matter.

The vestry voted to immediately move \$50k in parish deposits to Self Help Credit Union.

The vestry asked the St. James Foundation to educate the vestry on the current portfolio with an eye toward whether there are holdings in contradiction to the role and purposes of church mission and to explore what competitive options exist that positively impact racial equality while maintaining the fiduciary responsibility of the Foundation.

In communicating these decisions to the parish, the senior warden and the rector began their letter by saying “we understand that racism is not limited to individual acts perpetrated by one person but a system of advantage in our world based on race. We acknowledge this work is long overdue. This is only our beginning.” And they closed their letter: “In the words of our Presiding Bishop, Michael Curry: If it’s not about love, it’s not about God.”

Since the vestry voted those actions, the deposit has been made, the statement has been released to the public, the congregation has engaged in reflection, study and action, and the vestry has opened dialog with the Foundation board.

St. Stephen’s Episcopal Church of Ridgefield, Connecticut

Youth lead the way to incorporating parish values into parish investing

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes
		(with new OCIO)	

Background

St. Stephen’s Episcopal Church was founded in 1725. Ridgefield was then a small New England farming settlement. In 1777 Ridgefield was the site of the only Revolutionary War battle fought inland in Connecticut; in the engagement the British burned St. Stephen’s, where the

Continental forces had stored supplies. Ridgefield now is a largely residential community, just off the beaten path, but close to towns and cities in-state and to New York City, 50 miles away. St. Stephen's has over 400 members and an endowment valued at about \$12.5 million.

For a few years St. Stephen's had felt unsure about how to be the church the world needed now. The parish last addressed its mission in the 1990s. Through Episcopal Church Foundation *Vestry Papers* and diocesan networks, St. Stephen's leaders had found other parishes' stories about re-imagining themselves for the 21st century. In 2016 the vestry decided to undertake a new visioning effort with the help of an organizational consultant who was a parish member.

Vision – Mission – Core Values

In January 2017 the parish began a year-long process that required vestry members and parishioners to listen to and engage with each other to discern what St. Stephen's should be. They began with a parish survey, followed by "town hall" sessions to listen to each other and share survey results and other resources. Then the parish held "visioning" sessions for small groups to imagine how St. Stephen's might "do church" differently. As they worked, the congregation began to realize they would have to re-imagine not just their life together but also how they used their financial and property assets.

At the end of 2017 the product was a three-fold statement:

Vision

A world made whole through God's transforming love in action.

Mission

Embracing and living God's commandment to love our neighbors – through worship, stewardship, and service to others.

Core Values

Faith-based Community

We are an inclusive, welcoming community that nurtures the spiritual development of all members in the recognition that often God is revealed to us through love, respect, and care for others.

Service

In the spirit of the example set by our Lord Jesus Christ, we are committed to using our gifts in service to our neighbors and others in God's created world.

Stewardship

We are committed to using our assets and blessings with great care in order for our beautiful, historic church to remain relevant and sustainable for this generation and those that follow.

Global Philanthropy Leaders

At the outset of the visioning effort, in February 2017, the rector attended the Consortium of Endowed Episcopal Parishes (CEEP) annual event . She learned how some TEC parishes were using environmental, social and governance (ESG) factors to invest faithfully, and how some invested assets to yield both financial return and positive social and environmental outcomes.

The same month a new parish member discussed with the rector a program in his prior church that, when he explained it, brought to mind her CEEP learnings. Adults and one youth of that parish had made small investments to fund microcredit loans in developing countries through a web portal called kiva.org. Although the loans paid no interest to the investors, the principal was repaid and re-loaned, repeatedly, so their small amounts of capital had growing impact.

The two brought the youth minister into their conversations. In a few weeks the three had designed a new program – for youth – called *Global Philanthropy Leaders* (GPL). St. Stephen's high school youth would be asked to use kiva.org to make microloans to enable people in developing countries to start or expand small businesses. The high school youth would lead the parish to respond to poverty on a global scale through making small investments that could make a big difference in people's lives.

The program launched at St. Stephen's at the start of the 2017 school year. Each high schooler was responsible to manage \$225 in capital. They contributed \$25 of their own money, and St. Stephen's vestry made the rest available. Wherever the assets came from, the young leaders understood that they were responsible to St. Stephen's for the program and the capital.

Together the high schoolers studied Jesus' words about the poor and about stewardship. They learned how faith can inform action. They studied the global economy and microfinance and learned how microloan programs work. They got a glimpse into the lives of the poorest of the poor. They saw that initial seed money could be re-paid and used again and again. They learned financial metrics and how to evaluate loan proposals. They learned to make decisions on where to put money. Most of all, the youth learned – by doing – what it means to be entrusted with investing funds. And they also learned how to talk to adult audiences about what they had learned and accomplished.

(In the first three years St. Stephen's GPL made 208 loans of \$25 each, of which 133 were fully repaid in that time. Loan losses and delinquencies were well below the average for *Kiva*: only 0.35% was lost in currency exchange, and there were no defaults. In 2018, the St. Stephen's youth took GPL to parishes in Bridgeport and Darien, and in 2019 to half a dozen more parishes, with a matching grant from the Episcopal Church in Connecticut to help fund new participants. Through GPL about 65 high school students from nine congregations have invested \$10,000 in the developing world, one \$25 loan at a time. The loans have had a 99% repayment rate.)

Parish Values Investing

Soon after the parish had adopted its new Vision, Mission and Core Values, in February 2018 the investment committee chair made a presentation to the committee on sustainable investing using ESG. He asked: “Shouldn’t our investment philosophy also dovetail with our Vision, Mission, and Core Values?” The committee members responded favorably.

Then in April 2018 the young Global Philanthropy Leaders reported to the adults of the parish for the first time. The report on GPL resonated with the parish and its leaders – they saw that through GPL the youth had been investing in a manner consistent with the parish’s values.

The success of GPL inspired a common understanding among the rector, vestry and investment committee that the parish should align all the parish’s investments with the parish’s values.

The investment committee educated itself and made presentations to the vestry. In March 2019 the Vestry authorized the investment committee to begin a process to integrate ESG into the St. Stephen’s portfolio and to seek a new investment manager. At a September 2019 “town hall” meeting for the entire parish, the investment committee presented a discussion of ESG and the committee’s work and plans. In November the investment committee prepared a new Investment Policy Statement (IPS) incorporating the use of environmental, social and governance factors. The vestry approved the new IPS in December 2019.

The St. Stephen’s IPS says:

St. Stephen’s is a mission-driven entity. Our mission is “embracing and living God’s commandment to love our neighbors – through worship, stewardship, and service to others.” Our investment philosophy seeks to incorporate our values in our investments. Therefore, in addition to financial analysis, we will strive to implement an investment approach that incorporates ESG factors for 100% of the investments (as practical and cost-effective).

Confident that ESG can work for St. Stephen’s, the IPS goes on to say “St. Stephen’s expects performance of its portfolio to perform as well, if not better, than a portfolio that does not incorporate ESG factors, *although we understand this is not guaranteed.*” (Emphasis original.)

Parish Values Investing – Implementation and Returns

The current money manager took some time to develop an understanding of the new IPS. In March 2020 the manager agreed to it, and the investment committee began implementation.

For the period of transition to a new investment manager, the committee decided to move St. Stephen’s assets to an ESG portfolio with the current manager. Due to record market volatility, that move was not completed until the end of August. As of August 31, 99.6% of the St. Stephen’s portfolio was held in ESG compliant investments.

In September St. Stephen’s issued a request for proposals (RFP) for an Outsourced Chief Investment Officer (OCIO) to manage St. Stephen’s assets consistent with the parish’s values. (The current manager was invited to make a proposal.) The proposals were to be received in October. After reviewing the proposals, the committee expected to hold an interactive meeting by Zoom with the top two respondents. In early December the investment committee expected to issue a recommendation to the vestry for hiring St. Stephen’s new OCIO.

Other than its GPL investments through *Kiva*, St. Stephen’s does not have any alternative investments. The current ESG portfolio includes at least one fixed income impact investment, and the investment committee chair anticipates that St. Stephen’s may make more once the new OCIO is in place.

In the meantime, St. Stephen’s youth and their mentors were gearing up for their fourth year of GPL. And the rector reports that “we’re still inspiring and encouraging one another to live into our Vision, Mission, and Core Values.”

Trinity Episcopal Church, Indianapolis

Aligning investments with parish values, to support parish priorities

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

Background

Trinity Episcopal Church now has more than 700 members. The parish was founded in 1919. The new parish bought an empty church building in the then northern suburbs. As the city changed and the congregation grew, the parish stayed in the neighborhood, about three miles north of the city center, the Soldiers and Sailors Monument at Monument Circle. The cathedral of the Episcopal Diocese of Indianapolis, Christ Church Cathedral, is located on the Circle.

In 1960 Trinity Indianapolis (Trinity Indy) opened St. Richard’s Episcopal School, one of the first integrated schools in Indianapolis. Today the school is an independent organization recognized as a Section 501(c)(3) charity. The school and the parish share a commitment to urban mission and remain located together in a campus setting extending over a city block.

In the 1960s Trinity created an endowment fund to support its mission. At his death in 1977, Eli Lilly, a resident of Indianapolis, a major philanthropist, and a lifelong Episcopalian, made a number of significant bequests, including to the Diocese, to Christ Church Cathedral, to St. Paul’s Episcopal Church, and to Trinity. Trinity added its gift – stock in Eli Lilly and Company

valued at the time at about \$4 million – to its endowment fund. With additions and net investment gains, the endowment has grown; currently the fund is valued at about \$20 million.

The 2008-9 financial contraction spurred Trinity to better align its investment management with its mission and faith. By 2015 Trinity had concluded it should replace the traditional endowment investment model with an approach focused on its own mission priorities and values. After issuing a request for proposals and interviewing respondent organizations, Trinity engaged the Church Investment Group (CIG) as investment manager to help develop and implement such a new way. CIG is a not for profit company that serves institutional investors related to the Episcopal Church, and CIG is a signatory of the UN Principles for Responsible Investment (PRI). In November 2018 Trinity's vestry formally adopted its new policy, embodied in a new investment policy statement (IPS): *A Faith and Goals Based Approach to Investment*.

Faith and Goals Based Investing – Mission Priorities and Values Alignment

Under the traditional model Trinity would seek to maximize risk-adjusted return on its whole endowment and apply a single spending formula to determine the endowment's share of budget support. Now Trinity seeks to have everything the parish does – in mission/program and in investing -- reflect its values. To that end, Trinity has articulated its mission/program priorities and identified how its endowment *may be invested in support of each of those priorities and in alignment with the parish's values*.

Mission Priorities

Through a parish-wide review of its mission/program actions and expenditures, and with the advice of CIG, Trinity Indy has identified the following mission areas as community priorities:

- A. Ministry, defined broadly as operational support for the worship, spiritual formation and pastoral programs of the parish;
- B. Outreach and Justice (programs, including grant making);
- C. Capital Expenditures for Buildings and Properties;
- D. Direct Mission Investments (community investments, e.g., for renovation of neighborhood properties and/or to provide housing to homeless members of the LGBTQ community);
- E. Funds for Future Generations (assets for use 30 to 100 years in the future, not now).

The IPS recognizes that these priorities will require different portfolios and asset allocations in order to support each of these priorities appropriately, and that these portfolios may be managed separately and independently.

The IPS identifies the following as primary investment goals for the portfolios for Ministry, Outreach and Justice and Capital Expenditures for Buildings and Properties:

- *Maintain the spending distribution rates of the individual portfolios, recognizing that a payout percentage will be set annually.*

- *Over a rolling three- to five-year period attain an average annual total return (net of fees) at least equal to the spending rate plus inflation to preserve purchasing power.*
- *Achieve positive social and environmental impacts.*
- *Avoid investing in companies whose negative environmental or social impacts clearly conflict with the values of the Episcopal Church.*

The IPS notes that these objectives lead to an equity-oriented investment strategy, which in turn implies that the total market value and amount available for spending may fluctuate. For 2020, the Ministry portfolio is targeted at 60% equities and 40% fixed income; the Outreach and Justice portfolio is targeted at 73% equities and 27% fixed income; and the Buildings and Properties capital portfolio is targeted at 50% equities and 50% fixed income.

The IPS identifies the following as primary investment goals for the portfolios for Direct Mission Investments and Funds for Future Generations:

- *Direct Mission Investments -- achieve an acceptable rate of return while producing impacts beneficial to the missions of Trinity Indy.*
- *Funds for Future Generations -- maximize the real return (nominal return less inflation) of the assets over a complete market cycle.*

For 2020, the Direct Mission investments portfolio is 100% fixed income, and the Future Generations portfolio is 99% equities, 1% fixed income, with a goal of capital appreciation over a 50 to 100 year time horizon.

In the past Trinity's portfolio included some alternative investments. Trinity does not now expect to own alternative investments, except through its Direct Mission Investments.

The most recent Direct Mission Investment is a loan to support the establishment and operation of Trinity Haven. Trinity Haven, located in Trinity Indy's neighborhood, is the first residence in Indiana dedicated to LGBTQ youth at risk for homelessness. Beginning in 2017-18, Trinity Indy created and incubated the organization. Now Trinity Haven is an independent Section 501(c)(3) charity and a designated Cooperating Ministry of the Diocese of Indianapolis.

Values Alignment

Trinity Indy's IPS identifies its explicit values orientation as follows:

Ethical investment considerations form an integral part of Trinity Church's mission and witness. Through a faith-based investment policy, Trinity Church seeks a constructive engagement with the corporate world in order that responsible environmental and business practices and high standards of corporate behavior are encouraged and supported. Trinity Church is also mindful of the need to avoid undermining the credibility, effectiveness and unity of the Trinity Church's mission by profiting from, or providing capital to, activities that are materially inconsistent with Episcopal values.

Without using the term “environmental, social and governance (ESG) factors,” this paragraph clearly adopts ESG and responsible investing as Trinity’s overall approach. The paragraph also acknowledges the need to use negative screens (no-buy lists) as well as positive screens.

The IPS then states “An important component of an ethical investment policy is the use of positive ethical criteria in assessing companies.” As an Episcopal church, Trinity seeks to be ethical as a Christian institution and to use positive Christian ethical criteria to assess ESG factors affecting its investments.

For positive Christian, and Anglican, ethical criteria, Trinity takes the Church of England as its guide. The IPS adopts the criteria developed by the Church of England’s *Ethical Investment Advisory Group (EIAG)*, summarized as follows:

- Responsible employment practices
- Best corporate governance practices
- Conscientiousness regarding human rights
- Sustainable environmental practices
- Sensitivity toward the communities in which businesses operate

Trinity Indy’s IPS goes on to make explicit that, in exercising its fiduciary duty by following these Church of England criteria, Trinity Indy will “integrate Environmental, Social and Governance (ESG) investment criteria into Trinity Church’s investment management process.”

(See the Context section at the end of this report for more on the Church of England’s EIAG.)

Faith and Goals Based Investing – Implementation and Returns

As noted above, Trinity Indy engaged CIG to help Trinity Indy both to develop and to implement its faith and goals based investment program. With CIG’s advice, Trinity has engaged an Outsourced Chief Investment Officer (or OCIO) to manage, consistent with the Trinity IPS, all the Trinity portfolios described above, except the Direct Mission Investments. The Trinity vestry and investment committee directly manage the DMI.

Following implementation of the new IPS beginning at the end of 2018, and in spite of volatility since the pandemic hit, Trinity’s portfolios have performed in line with expectations, both with respect to ESG and financial return. Trinity’s leaders are happy with the results.

Trinity Church Wall Street

Investing responsibly, applying core values and strategic focus to evaluate opportunities along an investing spectrum, because no investment category yields purely financial or purely social return

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

Background

Anglicans worshipped in New Netherland when it was Dutch and in New York when it was English. In 1697 the English Royal Governor granted a charter to Trinity Church, which then built the first Church of England parish church in Manhattan, at the head of Wall Street. The governor also leased Trinity a 215-acre tract north of Wall Street, the King’s Farm. In 1705 Queen Anne granted the tract outright to Trinity, thus providing the basis for Trinity’s wealth.

Until the American Revolution, Trinity Church helped lead the development of the Church of England in the colony of New York. After the Revolution, Trinity Church was among those that navigated a path to an independent Anglican presence in the new nation. Trinity helped in the creation of the Diocese of New York and the Episcopal Church and their subsequent growth, down to the present. In the last half century Trinity has been more and more engaged across the Anglican Communion through Trinity’s grants and leadership programs. In addition, from the 18th Century into the 21st, Trinity Church Wall Street has played a role from time to time in the business and residential areas in lower Manhattan and in the larger City called New York.

By the 20th Century, through sales and other dispositions, Trinity Church Wall Street’s holdings had been reduced to about 14 acres of the former King’s Farm, in what is now called Hudson Square. On the West Side, not far from Wall Street and the new, rebuilt World Trade Center, Hudson Square has become a focus of interest for real estate developers.

Norges Bank Investment Management (NBIM) is the investment management unit of Norges Bank, Norway’s central bank. NBIM manages the Government Pension Fund Global, commonly known as the oil fund, for the Ministry of Finance, which owns the fund on behalf of Norway’s people. In 1990 the government created the fund as a policy tool to support long-term management of tax, license and other revenues from Norway’s North Sea petroleum fields. The oil fund is the world’s largest sovereign fund, with assets of over \$1 trillion.

Norway has set two principles for NBIM: All assets are to be invested outside Norway to keep the fund independent of Norway’s economy. And all fund assets are to be invested ethically.

NBIM aims for real estate to comprise about 5% of oil fund investments. In late 2015, Trinity sold to NBIM a minority interest in a joint venture holding Trinity’s commercial office buildings. In April 2016, the joint venture brought in Hines, the global real estate manager, as operating partner, with a 1% stake; NBIM holds 48% and Trinity 51%. Through this transaction, NBIM

increased its exposure to real estate in New York City, while Trinity reduced its New York City real estate exposure and increased the liquidity and diversification of its investment portfolio.

In April 2016 Trinity engaged its first Chief Investment Officer (CIO), who had served as co-CIO of the Carnegie Corporation of New York, a foundation with about a \$3 billion endowment. Trinity tasked the CIO to create a professional investment management team and then diversify Trinity's non-real estate portfolio to include substantially all asset classes and markets. That portfolio's exposure to scale private equity had to be built essentially from scratch.

At the end of 2019 Trinity's direct real estate and diversified financial investments had market values of about \$3.1 billion and \$3 billion, respectively, for an aggregate of about \$6.1 billion.

Of the \$3 billion in diversified assets, private equity represented a little under 6%. Over the next few years Trinity expects to grow that to 15-20% of diversified assets. Trinity's real estate holdings are comparable to investments that peer investors include in their private/illiquid exposures. Taking direct real estate and diversified private equity into account, at year end about 53% of the aggregate \$6.1 billion was in private/illiquid exposures.

Strategic Planning and Responsible Investing

In 2014, the year before the formation of the Trinity-NBIM joint venture, Trinity began a strategic planning effort. The congregation, vestry, staff, faith and community groups, service organizations, and others in the City were engaged in the process. That work has continued through implementing phases in 2019-20.

Through this process Trinity identified its six core values – *faith, integrity, inclusiveness, compassion, social justice* and *stewardship*. In defining the values Trinity was guided by reading scripture and the Baptismal Covenant. Here are Trinity's statements for three of these values:

Inclusiveness

There is neither Jew nor Greek, there is neither slave nor free, there is neither male nor female; for you are all one in Christ Jesus. – *Galatians 3:28*

We will embrace diversity and will respect the dignity of every human being.

At Trinity Church Wall Street, all are welcome. We seek to honor the God-given dignity and learn from the experience of every human being. Everyone is invited to participate in worship, join activities, work together, and lend their voices to build a better world where everyone is seen and known as a child of God.

Social Justice

He has shown you what is good; and what the Lord requires of you: to do justice, and to love kindness and to walk humbly with your God. – *Micah 6:8*

We will strive for justice and peace among all people.

Social justice is the love of God in action. God calls us to live justly for the good of the whole human family. With Trinity's focus on community building, we continue to live out the Gospel imperative of love that does justice.

Stewardship

There will come seven years of great plenty throughout all the land of Egypt. After them there will arise seven years of famine, and all the plenty will be forgotten in the land of Egypt; the famine will consume the world. – *Genesis 41:29-30*

We will sustain the gift of joy and wonder in all Your works.

Stewardship is the careful and faithful management of what has been entrusted to our care. Trinity's resources have been put to use for more than 320 years to support other churches, hospitals, and schools and to empower emerging leaders and support sustainable ministries in the neighborhood, the city, and the world.

Addressing these six values, Trinity identified its strategic mission to be building neighborhoods, leadership and capacity in New York City and across the Church, including the Anglican Communion. To carry out the elements of that strategic mission, Trinity identified five major initiatives: the building/facility it calls Trinity Commons, racial justice, housing and homelessness, leadership development and mission real estate development.

In the course of the planning process, as noted above, early in 2016 the vestry engaged Trinity's first CIO. Later that year the vestry and its investment committee addressed the role of responsible investing for Trinity's diversified portfolio. At its September 2016 meeting, the investment committee concluded that responsible investing would provide a "holistic framework" for Trinity's CIO and investment team to evaluate investment opportunities through the lens of Trinity's core values. Further, Trinity's strategic imperatives/areas of strategic focus – building neighborhood, leadership, and capacity – would provide a context to guide investment decisions, including in evaluating outside managers and how they achieved their results. The investment committee agreed Trinity should work with like-minded investors to support engagement and change in areas that fit with Trinity's values. Similarly, Trinity would seek to partner with peers to build capacity in responsible investing.

The investment committee prepared a new Investment Policy Statement (IPS) embodying its conclusions and recommended it to the vestry. In December 2016 the vestry approved the IPS.

Implementing Responsible Investing

Following vestry approval of the IPS, Trinity's policy has been that all investments in the diversified portfolio are to be made by the CIO and investment team *consistent with principles of responsible investing, in light of Trinity's core values and in support of Trinity's strategic imperatives/areas of strategic focus*. Since that time the investment team and CIO have been

working with the investment committee, the vestry, the clergy and other staff, particularly the grants staff, to develop common understandings of how Trinity should implement its approach.

To support the approach, under the guidance of the investment team Trinity made three organizational commitments in 2019. In January Trinity joined the Interfaith Center on Corporate Responsibility (ICCR), the premier interfaith shareholder engagement organization in the United States. In February Trinity joined the Global Impact Investing Network (GIIN), the leading organization for impact investors worldwide. In December Trinity put in place with Glass Lewis & Co., LLC (Glass Lewis), the proxy-voting organization, arrangements for Glass Lewis to vote proxies for Trinity with public companies using environmental, social and global (ESG) factors and following guidance from ICCR and the Committee on Corporate Social Responsibility (CCSR) of Executive Council. Through ICCR Trinity can develop strategic partnerships with other engaged shareholders on issues that matter to Trinity. Through GIIN Trinity can develop impact investing opportunities with other investors. Through Glass Lewis Trinity can make its shareholder votes count.

Mission Investing Spectrum

Trinity seeks to advance its core values of faith, integrity, inclusiveness, compassion, social justice, and stewardship through both its programs and its investments – and to manage its programs and its investments to advance those values. In so doing, Trinity need not be constrained by traditional views of what constitutes an institutional asset or how assets can be deployed. For example, Trinity’s engagement in ministry can be viewed as an expression of commitment to Christian values and a kind of asset embodying those values. Trinity’s reputation also can be viewed as an asset: Trinity can “invest our name and reputation to convene, persuade and advance our mission.”

Working with Trinity’s vestry and investment committee and its clergy, investment staff, program staff, and grants staff, Trinity has developed a descriptive tool, the *Mission Investing Spectrum*, to help guide Trinity as it both carries out its programs and manages its investments. The tool sets forth a spectrum or continuum of categories of asset running from *reputation* through *ministry* and *grants* and then commonly recognized sorts of investment, including *program related investments*, *mission related investments*, *sustainable investments*, and traditional “purely” *financial investments*.

The institutional assets identified by these categories can be deployed – or invested – in a variety of strategic ways to advance Trinity’s core values. The Mission Investing Spectrum relates these categories of asset to each other guided by the principle that none of these strategic investment categories yields purely financial return or purely social return.

Trinity Mission Investing Spectrum

Trinity Church Wall Street: Mission Investing Portfolio Categories						
Investing with, and in, our core values						
Commercial/ Traditional Investments	Sustainable Investments/ Socially Responsible Investments (SRIs)/	Mission Related Investments (MRIs)	Program Related Investments (PRIs)	Grants	Ministry	Reputation
Investments where the potential for attractive risk-adjusted financial returns is the primary reason for investing. At Trinity Church Wall Street, all investments are subject to a values screen	SRIs originally referred to investments that employed negative screens so that an organization could avoid investments in conflict with its values and/or mission. ESG investments adhere to good Environmental, Social and Governance practices. Can include: pro-actively seeking out ESG-aligned and/or sustainability focused funds; divestment from certain industries (e.g. "sin stocks"); proactive engagement through shareholder resolutions and/or proxy voting. With sustainable investments, investors are seeking investments that are aligned with the organization's values	Investments that expect mission/social impact as well as financial return. Targets risk-adjusted market rate returns though willing to consider lower risk-adjusted returns if the mission alignment benefits justify the investment. With these opportunities alignment with non-financial interests are the primary consideration and financial return/impact is important but secondary With MRIs investors are seeking investments that are aligned with the organization's mission.	Investment designed to advance mission work. IRS guidance states that PRIs must have the primary purpose of accomplishing a charitable purpose and production of income may not be a significant purpose. But unlike grants, which cannot be recovered, principal of a PRI is recoverable and the investment may earn interest or other returns.	Investment in an organization or project with no expectation of a financial return – the investor's sole interest is social return.	Investing in people and their lives and faith.	Trinity reputation is another form of endowment: We can invest our name and reputation to convene, persuade and advance our mission.
Investment Committee & relevant subcommittees		Grants Committee Investment Committee	Grants Committee		Clergy	

The Mission Investing Spectrum is a work in progress; see the version above. At the bottom of the columns the spectrum identifies vestry committees and clergy with roles relating to the portfolio categories listed above them.

Accordingly, the investment team applies the *Mission Investing Spectrum* as it develops Trinity's diversified portfolio, and the grants staff develops grants programs. In doing so, the investment team and the grants staff identify and apply a variety of benchmarks of financial and social return to assess performance.

The investment team describes how, with grants staff and others, the team applies the *Mission Investing Spectrum*, as follows:

In the Investment Portfolio (commercial/traditional investments) we look to partner with managers whose values align with Trinity's, seek market-rate returning opportunities related to Trinity's strategic focus areas, and managers who incorporate ESG issues into investment analysis and decision-making and ownership policies and practices, and avoid investing in certain businesses that are in direct conflict with Trinity's core values (socially responsible investments). Assuming the risk-adjusted return of a positive impact investment

is at least equal to that of other available investments, we would choose the positive impact opportunity over investments that are not values aligned.

With socially-focused grants we look to fund organizations and dioceses that have the ability to spend grant funds responsibly and well.

In the middle of the spectrum, we seek opportunities to blend social and financial return with mission related investments that expect mission/social impact *as well as* financial return. These investments target risk-adjusted market rate returns, but we would be willing to underwrite lower return/higher risk if the mission alignment benefits justify the investment and meet the benchmark. With these opportunities alignment with non-financial interests are the primary consideration and the financial return/impact is also important to our holistic values investing strategy.

In 2018 Trinity made an impact investment to finance healthcare facilities in underserved communities, and in 2019 it made two impact investments, both in affordable housing funds. In August 2020, 69% of assets under management in Trinity's securities portfolio were invested with managers that use at least one form of sustainable investing. The Trinity investment team expects to make many more such investments as it works with others to continue to develop Trinity's diversified portfolio and improve the usefulness of the *Mission Investing Spectrum*.

Note: to give an overview, at the top of each story appear four headings. These identify the three elements General Convention assigned to be examined – “[1] applying ethical guidelines in investment selection and management, [2] shareholder activism, and [3] investing for responsible social and environmental outcomes as well as financial return” – plus ESG, because ESG is often used to implement guidelines.

Dioceses

Episcopal Diocese of California

Investing Diocesan assets with DFMS

Ethical Guidelines DFMS	ESG DFMS	Engmnt-Vote Prxies DFMS	Rspnsble Outcmes & Return DFMS
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The Episcopal Diocese of California has investment responsibility for about \$28 million in assets. About half, or about \$14 million, consists of assets belonging to the Diocese. Income and proceeds from these assets are used to support the annual diocesan operating budget and other Diocesan funded purposes and programs. The other half, also about \$14 million, is comprised of assets held by the Diocese for the benefit of third parties, such as congregations, camps, and other institutions. Income and proceeds of these assets support those institutions.

In 2015 the Diocesan Investment Committee undertook to determine how the Diocese should invest these assets in a socially responsible manner, such as by using environmental, social and governance (ESG) factors in management.

As called for by a resolution passed by Diocesan Convention in 2015, the Diocese formed a task force on socially responsible investing. The task force studied the issues, met with numerous interested parties and bodies, did a diocesan-wide online survey of views on socially responsible investing and considered the impact of resolutions passed by Diocesan Convention. Both actions of Diocesan Convention and the results of the survey provided support for implementing responsible investing. The investment manager previously engaged to manage most of the Diocesan assets was not then using ESG. It appeared that some time could be expended and cost incurred if the Diocese sought to remain with this manager while this manager developed ESG capacity or found another solution.

The Diocesan Investment Committee considered the work of the task force and discussed possible actions. As a result of this effort, the Committee recommended that the Diocesan Executive Council cause the Diocese to invest all the assets held by the Diocese with The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (the Domestic and Foreign Missionary Society or DFMS), the corporate entity holding and managing investment assets for The Episcopal Church as a denomination. As well as holding and investing assets for TEC itself, DFMS, in a manner similar to that of a mutual fund, holds and invests assets for numerous entities in TEC.

The Investment Committee found DFMS’s returns to be competitive over several years. The Committee felt administration would be readily managed and cost-effective. The Investment Committee decided that the Diocese would have the benefit of DFMS’s socially responsible investment actions, because DFMS was supposed to invest in accordance with socially responsible guidelines or mandates adopted by General Convention and Executive Council.

Diocesan Executive Council approved the move recommended by the Investment Committee. The Diocese moved its investment assets to DFMS at the end of 2016.

Episcopal Church in Connecticut/Episcopal Diocese of Connecticut

Reflecting the values of the Episcopal Church in environmental stewardship, social responsibility and corporate governance (ESG)

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	No	No

In 1863 the Episcopal Diocese of Connecticut/Episcopal Church in Connecticut (ECCT) established a separate corporation, Donations and Bequests for Church Purposes, Inc. (D&B), to hold and invest assets of the Diocese and of parishes and organizations in the Diocese. D&B has about 130 participants, consisting of about 120 parishes and 10 other organizations, including ECCT and organizations related to ECCT. The Fund’s assets have a combined market value of about \$128 million, of which ECCT owns about \$55 million and parishes and other institutions own about \$72 million.

D&B maintains two pooled investment funds: the Balanced Fund and the Values Investment Fund (Values Fund). The first has assets totaling about \$123 million as of June 30, 2020, and the second has assets totaling about \$5 million as of that date.

In 2018, in response to advocacy by D&B Trustees, ECCT and D&B created the Values Fund as an alternative vehicle for D&B investors. The Values Fund is managed to “reflect the values of the Episcopal Church in areas of environmental stewardship, social responsibility and corporate governance (‘ESG’ Performance).”

The Values Fund became operational with ECCT’s transfer of some \$4.6 million of ECCT assets from the Balanced Fund to the Values Fund. ECCT, the D&B Trustees and Balanced Fund investors are pleased with the performance of the Values Fund, showing a small measure of out-performance versus the Balanced Fund. Consideration may be given in the future to transferring additional ECCT assets to the Values Fund and to encouraging parishes and other investors to become ESG investors through switching from the Balanced to the Values Fund.

Episcopal Diocese of Massachusetts

The Trustees of Donations respond to Diocesan Convention and, to address a moral concern, create a fossil fuel free alternative stock fund for Diocesan Investment Trust participants

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

In the Episcopal Diocese of Massachusetts, the Diocesan Investment Trust (DIT) provides management of investment assets for the benefit of the Diocese, the Cathedral Church of St. Paul, 131 congregations (out of the 184 in the Diocese), and 14 other organizations affiliated with the Diocese. The 147 participating institutions have over 900 separate accounts in the DIT, which was organized in 1939. The DIT is managed and operated by the Trustees of Donations to the Protestant Episcopal Church (TOD), a corporation founded in 1810 that is separate from but related to the Diocese. Due its corporate history, including the merger of a Diocesan corporation into the TOD more than half a century ago, the TOD has a board of trustees, 28 in number, the members of which are chosen in various ways. Three of these are officers of the Diocese who serve on the TOD board *ex officio*. Of the others, five are appointed by the Bishop, five are chosen by Diocesan Convention, and the remaining 15 are self-perpetuating.

Assets invested in the DIT with respect to any participant may be of two types, depending on the ownership of the assets. Such assets may be (1) trust fund assets, if they are assets benefiting a participant that are subject to a trust for which TOD is the trustee, or (2) “agency” fund assets, if they are owned outright by the participant. The difference may be described in a somewhat more legalistic way as follows: With “agency” fund assets, both legal and beneficial ownership lie with the participant organization. With trust fund assets, beneficial ownership lies with the participant organization, while legal ownership lies with the TOD.

A parish, congregation or other institution that decides to invest its own assets in the DIT does so by opening an “agency” account. The organization exercises complete discretion over such an account. Such an account can be closed by the owner at any time, and the owner is free to allocate assets in the account in and among the DIT’s three investment alternatives.

The DIT’s trust fund accounts were established differently. These accounts, the oldest of which dates back to 1810, were created by grantors who named the TOD as trustee for a named beneficiary, such as the Diocese or a parish. As indicated above, the TOD is the legal owner and the participant organization is the beneficial owner. As trustee, TOD is responsible for allocating the balances in trust accounts in and among DIT investment alternatives. TOD also is required to assure that distributions are made in accord with the governing trust instruments.

As of June 30, 2020, the DIT managed assets with about \$237 million in total value. Of this, five percent, approximately \$12 million, represented assets for the benefit of the Cathedral. Thirty-

one percent, about \$73 million, represented assets for the benefit of the Diocese. The remainder, valued at just under \$152 million, represented assets for the benefit of participating parishes/congregations and other participating organizations.

Of the \$237 million in total assets, just under \$100 million, or about 42% were trust fund assets. The remaining 58% were agency fund assets. Of the \$73 million in assets for the benefit of the Diocese, about \$30 million were Diocesan agency funds and about \$43 million were trust funds.

Before 2015, the TOD offered participants two funds, the Stock Fund and the Income Fund, the latter focused on bonds. Also, before 2015, the DIT excluded gambling, tobacco and coal mining companies from the Stock Fund. These exclusions may be seen as traditional “sin stocks,” but they were based on ethical views recognized by the Diocese and also by the TOD.

In November 2013 Diocesan Convention passed a resolution that “called upon” the Trustees of Donations to “design an alternative investment vehicle” for DIT participants “that is free from fossil fuel production companies, ...[and] might also include companies that... invests [sic] significantly in clean renewable energy.” In the next two years the Diocese and TOD took steps to respond affirmatively to that call from Diocesan Convention.

In November 2015, with an \$8 million pledge by the Diocese in hand, the TOD and the DIT launched the Diocesan Fossil Fuel Free Fund. The new fund excluded the same gambling, tobacco and coal mining companies already excluded from the Stock Fund. To be fossil fuel free, the new fund screened out companies deriving more than five percent of revenues from fossil fuel production and also affirmatively allocated five percent of assets to companies that produce alternative energy, “green” buildings, and energy efficiency and pollution prevention technologies. This alternative was designed to be managed passively and to track a custom benchmark selected by the Financial Advisory Committee of Diocesan Council.

In November 2015, in explaining the new Fossil Fuel Free Fund to participants, the TOD wrote that the new fund had been created “to address a moral concern”:

Participants should keep in mind that the Diocesan Fossil Fuel Free Fund has been created to address a moral concern and that its returns will be affected (for better or worse) by the absence of investments in most of the Energy sector, a sector whose stocks comprise a large segment of the investable universe. In addition to our own Diocese’s decision to invest a portion of its assets in this new fund, you should also be aware that the National Church has voted to divest its endowment from fossil fuels. While as trustees, we are legally required to make recommendations based on investment merit alone (a constraint that prevents us from investing trust fund assets in this new fund), we are pleased to offer this Stock Fund alternative to agency fund participants who wish to direct a portion, or all, of their Stock Fund investments to it.

As the above indicates, DIT trust fund assets are only invested in, and allocated between, the Stock and Income Funds. Owners of agency funds may invest them in the Fossil Fuel Free Fund.

As of June 30, 2020, the three funds offered by the TOD and DIT had the following approximate values, respectively: the Stock Fund, \$136 million; the Income Fund, \$85 million, and the Fossil Fuel Free Fund, \$16 million. Of the \$16 million in the Fossil Fuel Free Fund, the Diocese’s agency assets comprise just under \$10 million, or about 63% of the Fossil Fuel Free Fund. The remaining 37% is held by congregations/parishes and other institutional participants in the DIT.

TOD is a member of the Interfaith Center on Corporate Responsibility (ICCR), the premier interfaith shareholder engagement organization in the United States. TOD votes its proxies for companies in both the Stock Fund and the Fossil Fuel Fund in line with the work of ICCR and the guidelines on proxy voting maintained by the Executive Council’s Committee on Corporate Social Responsibility (CCSR) and DFMS.

The Fossil Fuel Free Fund includes investments made for responsible social and environmental outcomes as well as financial return. These may be considered “impact investments.”

Episcopal Diocese of Michigan

With a history of commitment to community investing, choosing low cost mutual funds and ETFs that have sustainability/ESG values acceptable to the Diocese

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes, through fund selection	Yes, through selected funds	Yes

In 1932 the Episcopal Diocese of Michigan established a separate corporation, the Trustees of the Protestant Episcopal Church for the Diocese of Michigan (the Trustees Corporation), to hold, manage, and invest assets of the Diocese as well as assets of parishes or congregations and agencies related to the Diocese. The governing board of the Trustees Corporation is its board of trustees. The governing board members (styled as the Trustees) include the Bishop *ex officio* and 16 others, four clergy and 12 lay, who are elected by the Diocesan Convention.

In 1967 the Trustees Corporation established the Growth and Income Fund (the Fund) as a collective trust fund to hold and invest assets committed to the Trustees Corporation. The Fund currently has 54 participants, consisting of the Diocese and two Diocesan entities, four agencies related to the Diocese, and 47 congregations. The Fund has a combined market value of about \$40 million, of which the Diocese (and its entities) own about \$22 million, while the remaining \$18 million is owned by the other participants, the congregations and agencies.

A decade or so ago the Fund’s assets were under active management and largely held directly in equity and fixed income securities. Since then the Trustees have transitioned the Fund to a passive investment model with a broadly diversified portfolio. Now the Fund is invested entirely

in low cost, good performing mutual funds, including index funds, and exchange traded funds (ETFs). With advice and support of an investment consulting firm, the Trustees themselves have designed the portfolio and selected the mutual funds and ETFs to be held by the Fund. The Trustees regularly review the asset allocations among mutual funds and ETFs, and the performance and costs of these funds, and change allocations and funds as they determine appropriate.

The Trustees created this portfolio to meet the growth and income expectations of the Fund's participants at low cost and to simplify administration. As suggested above, the use of ETFs and mutual funds not only keeps costs low, but by investing in a selection of such funds the Trustees can establish a diversification spread that could be difficult to achieve with direct investments and then only with much higher expenses.

In 2003, before adopting a passive investment model, the Trustees adopted socially responsible investment guidelines for all assets held in the Fund. When adopted, these guidelines were incorporated into the Investment Policy Statement (IPS) for the Fund. These guidelines set negative screens for the Fund portfolio by reference to the no-buy lists maintained by DFMS based on the work of Executive Council's Committee on Corporate Social Responsibility (CCSR).

As noted above, all the Fund assets are held in passively invested mutual funds and ETFs, that is, pooled investment vehicles. Investors in such vehicles cannot screen anything out of any such vehicle, whether an ETF or mutual fund, because an investor has no say over what is put into the pool by the manager of the vehicle. Therefore, the Fund's negative screens cannot be directly applied to investments of the sort in the current portfolio.

However today there exist many ETFs and mutual funds, including index funds, created to apply environmental, social and governance (ESG) factors and sustainability analyses in their design and operation, both negatively and positively. Accordingly, an investor who wishes to do so may find a number of such funds to choose from. The Trustees thus can choose among a number of pooled sustainability/ESG vehicles with different philosophies and goals.

In designing the Fund portfolio and choosing funds and ETFs, the Trustees look at the asset classes available and the financial performance and costs of the pooled vehicles they are considering. They also look at the ESG/sustainability philosophy and performance of such pooled vehicles, applying the Fund's negative criteria.

For some years the funds in the Fund's portfolio have included some sustainability/ESG funds and/or ETFs that invest in alternative energy companies. The Trustees may have chosen them because, in their judgment, the funds fit the negative screens of the Diocese, but in fact the funds make affirmative uses of the assets in their pools. Accordingly, the Trustees must, at least, find those affirmative uses acceptable, ethically, to the Diocese, even if they are not the basis of the Trustees' choices. Thus, the Fund and the Diocese, investing purely passively, have become both negative and positive sustainability/ESG investors.

Separately from the Fund, the Diocese holds investment capital in Opportunity Resource Fund (OppFund), a tax-exempt, nonprofit community development financial institution (CDFI). The Bishop is a member of the OppFund advisory board.

In 1988, following action at the General Convention (which met that year in Detroit), the Diocese formed the McGehee Economic Justice Fund as an economic justice ministry. This fund was named after Bishop Coleman McGehee, then Diocesan Bishop, who was a strong proponent of the ministry. The McGehee Fund thereafter became an interfaith loan fund and then in 2004 merged with the Michigan Housing Trust Fund to form the Michigan Interfaith Trust Fund (MITF). In 2010 MITF became Opportunity Resource Fund.

OppFund uses investor capital, including that provided by the Diocese, to finance community development loans to individuals and organizations that have historically been denied access to capital by traditional institutions. At the end of 2019, OppFund had in place across Michigan over \$13 million in loans for affordable housing, small business creation and other forms of community development.

Episcopal Diocese of New York

In response to the Gospel, applying responsible investing comprehensively to promote the Diocese's mission: to contribute to a more just, sustainable and peaceful world

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

Background

In the Episcopal Diocese of New York there exist two sets of investments under oversight of the Diocesan Convention and Bishop. The Diocesan Trustees manage assets owned by the Diocese. The Trustees of the Diocesan Investment Trust (DIT) manage assets held by the DIT in trust for the benefit of parishes and other institutions that have entrusted them to the DIT. About half the Diocesan Trustees are elected by Convention and about half appointed by the Bishop, while Convention elects DIT Trustees. Serving *ex officio* as a trustee of each body, the Bishop presides over each. Diocesan assets stand at about \$54 million, while DIT assets add up to about \$91 million. For years the Diocesan Trustees have invested some Diocesan assets in the DIT. Now that amount is about \$11 million, so without overlap the two funds total about \$134 million.

As outlined below, both the Diocese and the DIT have committed to sustainable investing and to applying environmental, social, and corporate governance (“ESG”) factors in managing their investment assets, and the Diocese has created a community development investment program.

In 2013 climate change, the burning of fossil fuels, and fossil fuel divestment were issues in the Diocese. The Committee on the Environment (now the Committee on the Care of Creation) of the Diocesan Social Concerns Commission was addressing these matters through a number of measures, including a program of energy audits and energy efficiency improvements for parishes and through advocacy within and without the Diocese.

In November the Committee proposed a resolution to the 237th Diocesan Convention that did not mention divestment or any issue but took a broad approach. In adopting the Committee's proposal, Convention asked the Bishop, "in consultation with the Committee on the Environment and the Diocesan Investment Trust, to appoint a Task Force to study the merits of socially and environmentally responsible investing for The Episcopal Diocese of New York."

Task Force on Socially and Environmentally Responsible Investing

The Bishop appointed the task force in 2014. As directed by Convention, the Bishop consulted with the Committee on the Environment and the DIT. The membership of the task force reflected the diversity of the people of the Diocese. The Bishop appointed a former President of the DIT and a Trustee of the Diocese, both of whom were lay people with experience in socially and environmentally responsible investing (SERI). In addition, the Bishop appointed a lay non-Trustee member of the Investment Committee of the Trustees, the chairs of the Committee on the Environment and of the Social Concerns Commission (both priests), two younger members of the clergy, and a younger lay person. The Bishop also appointed a professor of environmental medicine and another lay person with experience in SERI, who was appointed chair. The task force included, *ex officio*, the Treasurer, the Chancellor, and the Diocesan Chief of Finance and Operations.

As noted, the resolution did not mention any issue but directed the task force to "study the merits of socially and environmentally responsible investing." Accordingly, the task force undertook a comprehensive study of investors' use of SERI to engage with issues broadly.

The members reviewed literature and did research. The professor taught the others about the effect of burning fossil fuels on human health. The chair prepared a report on the social and environmental issues that Diocesan Convention resolutions had addressed from 1960 to 2014.

The task force held two plenary meetings with experts. At one the task force met with two senior officers of the United Church of Christ who were responsible for investing UCC pension funds and endowment funds, to learn how that denomination applied the principles of SERI. At the other the task force met with a senior officer of a national community development financial institution (CDFI) to learn about the community investing industry and CDFIs. Task force members also met with vestries and investment committees of two parishes. In addition, task force members met with Diocesan Trustees and, another time, with DIT Trustees. Task

force members attended a meeting of the Committee on the Environment, and the chair and members of the Diocesan Trustees Investment Committee met with the task force.

Anglican Communion Environmental Network

While the task force was studying SERI, the chair of the Anglican Communion Environmental Network (ACEN), the Most Rev. Dr. Thabo Makgoba, Archbishop of Cape Town and Primate of the Anglican Church of Southern Africa, called a meeting of bishops. Sixteen Anglican bishops whose people and dioceses around the globe were threatened by climate change met in South Africa with the Archbishop in February 2015. Among these was the Bishop of New York. (Hurricane Sandy had struck New York City in October 2012 and had inflicted serious damage, including on Diocesan churches and institutions, especially on Staten Island.)

On Ash Wednesday these bishops issued *The World Is Our Host – a Call to Urgent Action for Climate Justice*. They made eighteen proposals. On Church investments, the bishops said:

“We call for a review of our churches’ investment practices with a view to supporting environmental sustainability and justice by divesting from industries involved primarily in the extraction or distribution of fossil fuels.

“We call for the strengthening of ethical investment guidelines to include consideration of justice for the non-human creation as well as the interests of future generations of humanity.” p. 6, ¶¶ 6 & 7

In *The World Is Our Host* the bishops wrote words that the task force – and the Trustees – took as a touchstone: *“the climate change crisis is the most urgent moral issue of our day.” p. 7, ¶ 2*

Actions by Diocesan Investment Committee and Trustees

In November 2013 the Diocesan Trustees Investment Committee had engaged the Church Investment Group (CIG) as investment manager. CIG is a not for profit investment manager that serves institutional investors related to the Episcopal Church; CIG is now a signatory of the UN Principles for Responsible Investment (PRI). The Diocesan assets were fully invested under CIG’s management in April 2014. In February 2015 CIG made recommendations to the Committee regarding adopting an ESG approach. (The recommendations were implemented by the Investment Committee in 2016, after the Diocesan Convention acted in November 2015.)

At the Diocesan Trustees’ June 2015 meeting, prompted in part by *The World Is Our Host*, the Investment Committee actions outlined above, and the ongoing work of the task force – but before that work was completed – the Trustees took a significant step to guide the Diocese toward responsible investing. The Trustees unanimously approved the following resolution:

The Trustees of the Diocese of New York hereby undertake that, by Diocesan Convention in 2016, (1) the Trustees, as fiduciaries of funds of the Diocese, working with the Trustees’

Investment Committee and others, as appropriate, will complete a substantive review, grounded in the faith and mission of the Church, of the Diocese's investment policies and practices for funds whose management is overseen by the Trustees, with a view to adopting ethical investment guidelines, to include, among other things, consideration of justice for the non-human creation as well as the interests of future generations of humanity and supporting environmental sustainability and justice, including by considering divesting from industries involved primarily in the extraction or distribution of fossil fuels, (2) after that review, the Trustees will take appropriate steps to cause the implementation of the results of the review, and (3) the Trustees will report this current action to the Diocesan Convention in November 2015 and report the results of the review and the implementing steps to the 2016 Diocesan Convention.

Task Force Recommendations

Drawing on what it had learned through its broad study, including from *The World Is Our Host* and the Trustees' actions outlined above, the task force prepared a report to the Diocese, published in September, two months before the 2015 Convention. If adopted by Convention, the task force recommendations would apply to institutional investors in the Diocese, including parishes, as well as the Diocese itself and the DIT.

(However, although the task force addressed shareholder engagement in its report, it decided not to make any recommendations on that. While the task force was at work, Convention acted on its own. At Diocesan Convention in 2014, Convention by resolution affirmed the commitment of the Diocese and DIT to vote proxies, to undertake shareholder engagement, and align such actions with those of The Episcopal Church. That is Diocesan policy today.)

Diocesan Convention

On November 15, 2015, the 239th Diocesan Convention received the task force's report and recommendations. On the Convention floor the only comments were affirmations of the task force's work, report and proposals. The Convention voted to adopt the task force's proposed resolutions without amendment, by an overwhelming show of hands.

By its actions Diocesan Convention made the following decisions and recommendations:

- (1) that the Diocese establish a community development investment program;
- (2) that the Diocese adopt sustainable investing as an investment policy goal and become a signatory to the UN Principles for Responsible Investment;
- (3) that the governing body (whether called board or vestry) of the Diocese, of the DIT, of every entity related to the Diocese, and of every church, parish, or congregation in the Diocese,

- (i) carry out a substantive review of its own investment policies and practices for management of Church investment assets in light of its understanding of the Church's faith and mission, including the Church's social and environmental responsibilities;
 - (ii) develop ethical guidelines for socially and environmentally responsible investing, including consideration of justice for non-human creation, the interests of future generations of humanity, and support for environmental sustainability and justice; and
 - (iii) consider divesting from fossil fuel industries, particularly coal companies; and
- (4) that the Diocese itself divest from coal.

Implementation: Trustees of the Diocese

Three of the recommendations made by Diocesan Convention were directed solely to the Diocese. These were: (i) establish a community development investment program, (ii) adopt sustainable investing as an investment policy goal and become a signatory to the UN Principles for Responsible Investment, and (iii) divest from coal.

In 2016 the Trustees adopted sustainable investing as an investment policy goal. The Trustees continue to consider having the Diocese sign on to the PRI. For institutions committed to sustainable investing but hesitating to sign on, commonly the PRI reporting requirements are the reason; for the Diocese, the question comes down to staffing.

In 2017 the Trustees implemented the recommendation that the Diocese establish a community development investment program. The Investment Committee has invested endowment assets directly in a community development financial institution (CDFI) located in New York City that provides assistance, training and capital to immigrants and refugees. The Committee also has invested endowment assets in a fixed income investment pool that targets economic development in the geographic territory of the Diocese, that is, in the New York counties of Westchester, Putnam, Dutchess, Ulster, Rockland, Sullivan and Orange, and the New York City boroughs of Staten Island, Manhattan and the Bronx. With these investments, the Diocese has now invested over \$1 million in community development loans.

The fourth recommendation adopted by Diocesan Convention was directed to the Diocese and other institutional investors in the Diocese, including parishes. This recommendation may be summarized as "develop ethical guidelines for socially and environmentally responsible investing" and "consider divesting from fossil fuel industries."

As noted above, even before the task force made recommendations to Diocesan Convention, the Trustees of the Diocese had decided to carry out a review of the Diocese's investment policies and practices with a view to adopting ethical investment guidelines and to considering divesting from fossil fuel industries. That review was completed after Convention acted, and

the Trustees, on recommendation of the Investment Committee (and CIG), adopted a new Investment Policy Statement (IPS) on December 1, 2016. The IPS states its purpose as follows:

In response to the Gospel, to the challenge of responsible stewardship and to the Church's ethical teachings, the Diocese makes investment decisions taking into consideration both economic and financial factors and social justice and environmental justice factors. The Diocese is a steward of the financial gifts it has received. The Diocese has the responsibility to cultivate these gifts in order to promote the Gospel and to further the mission of The Episcopal Church and the Episcopal Diocese of New York.

It is the investment policy of the Diocese to seek investment return that supports financially the mission of the Diocese and at the same time to consider justice for all humanity, justice for nonhuman creation, the interests of future generations of humanity, and support for environmental sustainability and justice.

The IPS further states:

In evaluating potential investment strategies, priority shall be placed on identifying investments that are aligned with the Diocese's mission of contributing to a more just, sustainable, and peaceful world. ... The Diocese seeks over time to invest in funds that specialize in generating risk-adjusted returns while also incorporating environmental, social, and corporate governance ("ESG") issues and restriction of investments in fossil fuels into investment analysis and decision-making processes.

With CIG's guidance the Diocese has engaged Brown Brothers Harriman (BBH) as the Diocese's Outsourced Chief Investment Officer (OCIO) to manage the Diocese's separate investment account with CIG. BBH is a practitioner of ESG investing and, like CIG, a signatory of the PRI. ESG factors are applied by BBH in managing all of the Diocese's investment assets.

As noted above, in 2016 the Diocesan Trustees adopted sustainable investing as an investment policy goal. Early the same year the Diocese fully divested from coal. In January 2017 the Diocese's portfolio was divested fully (and remains divested fully) from companies with significant fossil fuel reserves.

Thus, the Diocese has created a community development investment program and has committed to sustainable investing and the use of ESG for all its assets.

Implementation: Diocesan Investment Trust

The Investment Committee of the Trustees of the Diocese and the Investment Committee of the DIT work together while continuing to fulfill their independent fiduciary responsibilities for the assets under their management. (As noted above, the Diocesan Trustees have invested substantial Diocesan assets with the DIT.) The DIT Investment Committee has not adopted for

itself the faith-based language found in the Diocesan Trustees’ IPS, but the DIT Trustees are fully aware of that language and are guided by the spirit of those words.

The DIT Trustees are also guided by the Diocese’s commitment to divesting from fossil fuels. The DIT has been selling fossil fuel companies, broadly defined, out of the portfolio and will continue to do so, with the intent to reduce fossil fuel exposure close to zero over time.

The Diocesan Investment Trust for many years has engaged the Commonfund as the DIT’s Outsourced Chief Investment Officer. The Commonfund is a nonprofit investment manager serving institutional endowments, private foundations and other nonprofit investors. The Commonfund has long integrated ESG principles into its investment management. Across all asset classes, 70% of the Commonfund’s managers use ESG and 15% are signatories of the PRI. The Commonfund became a signatory of the PRI in 2013.

The DIT became a PRI signatory following the adoption of the task force recommendations by the Diocesan Convention in 2015. With the assistance of the Commonfund, the DIT has been able to satisfy the reporting requirements for a signatory.

As a PRI signatory, the DIT requires its managers to use ESG. The DIT Investment Policy Statement expressly provides:

The Diocesan Investment Trust endeavors to incorporate Environmental, Social and Governance (“ESG”) considerations into the management of its endowment portfolio with the understanding that such considerations align with the Principles for Responsible Investment (“PRI”) and adherence to these principles may have a long term positive impact on the endowment. In furtherance thereof, the Investment Committee requires its managers to incorporate ESG factors in their analytical processes, along with other factors such as risk and return, to meet the portfolio’s over all investment objectives.

Thus, the DIT has committed to sustainable investing and the use of ESG for all its assets.

Episcopal Diocese of Oregon

Polling Convention delegates to determine their socially responsible investing and Gospel value priorities and then constructing a Diocesan portfolio based on those priorities

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

Background

In 1916 the Episcopal Diocese of Oregon created a corporation, under the name “The Diocese of Oregon,” to hold and manage real and personal property of the Diocese. The governing board is the Board of Trustees, and the board members are called Trustees. The Board is

comprised of the Bishop, the chancellor, the secretary, the treasurer, each serving *ex officio*, and three clergy and three lay persons elected by Diocesan Convention.

In 1992, by action of the Board, the diocesan corporation established and launched the Diocesan Investment Fund (the Fund), a pooled trust fund to hold and manage investment assets for the Diocese and for congregations and other entities in the Diocese that elect to invest in the Fund. The Board appoints a Diocesan investment committee, currently comprised of nine members, three of whom are elected Trustees. The investment committee sets investment policy and oversees investment of the Fund's assets. In 2012 the committee engaged Sellwood Consulting LLC (Sellwood) as its investment consultant.

Today the Fund comprises three subfunds: the Short Term Investment Fund (the STIF, inception date 2010, with current assets of about \$1.8 million), the original long term Diocesan Investment Fund (the DIF, inception date 1992, with current assets of about \$28.4 million) and the long term Socially Responsible Investment Fund (the SRIF, inception date 2016, with current assets of about \$3 million). The Fund assets in all the subfunds total about \$33 million. Of this, about \$11 million represents assets of the Diocese and related institutions. The remainder, about \$22 million, represents assets of congregations and other Episcopal entities investing in the Fund. The Diocese's share of the \$3 million in SRIF assets is about \$2.3 million. A growing number of congregations and other institutions participate in the SRIF along with the Diocese.

Diversification and cost savings are achieved in both the DIF and the SRIF portfolios by investing primarily, but not exclusively, in low cost institutional mutual funds.

Socially Responsible Investment Fund

At the 2013 Diocesan Convention, the Environmental Commission of the Diocese presented a resolution calling on the Trustees and the investment committee to cause the Fund to divest from fossil fuel industries and re-invest in renewable energy. On the floor of Convention, a substitute motion was passed. The substitute directed that two studies be conducted. The first was to address the "effects of divestment" and the second was to address including "socially responsible investing generally in a revised investment policy."

To work on these matters, the Trustees formed an advisory committee, which came to be called the Socially Responsible Investing Committee (SRIC). The committee consisted of two Trustees, two investment committee members, and two Environmental Commission members.

Over the next two years, in consultation with the Trustees, the investment committee, and Sellwood, its consultant, and the Environmental Commission, the SRIC developed a proposal for the Diocese to undertake socially and environmentally responsible investing in a faithful way.

At the 2014 Convention, the SRIC conducted a "dot voting" exercise with delegates to poll them on issues they believed the Diocese should address through responsible investing. By placing

dots on a display board stating alternatives for “socially responsible and gospel value priorities,” delegates chose positive and negative priorities for investing. The delegates rated “Climate and clean technology” and “Human Rights” as the top two positive Gospel value priorities and “Pollution and toxics” and “Human Rights” as the top two negative priorities.

At the 2015 Convention the SRIC submitted three resolutions calling for a subfund to be created in the Fund, the “Socially Responsible Investing Fund,” to “*reflect contemporary standards of socially responsible investing in addition to the gospel values priorities made known by Convention Delegates during a polling process conducted by the Socially Responsible Investment Committee (SRIC) at the 2014 Diocesan Convention.*” Convention enacted all three resolutions.

By these actions the Convention not only directed creation of the SRIF, it directed that, to launch the SRIF, the Trustees were to transfer into it one-third of the funds invested in the DIF under their control. Convention also specified that, every three years, Convention delegates should be polled on their current Gospel value priorities and on the fraction of Diocesan assets to be invested in the SRIF. Convention also required that the Trustees endorse the Episcopal Church’s decision to support the UN Sustainable Development Goals (SDGs) by authorizing the SRIF to invest to achieve the SDGs and authorizing micro-finance investments in its portfolio.

Finally, the resolutions directed the Trustees “to appoint a standing multi-stakeholder committee...to study any issues/concerns regarding SRI investment, divestment, reprioritization of SRI/Gospel Values,” to assist the Board “to communicate information regarding” the SRIF, and to “undertake the triennial polling... relative to the SRI/Gospel Values priorities... and preferred percentage of Diocesan... assets to be allocated to the SRIF.”

Stakeholder Advisory Committee

The new SRI Stakeholder Advisory Committee (SAC) includes members from participants in the SRIF. By design the SAC has become the link between the Trustees, the investment committee, Sellwood, its investment consultant, and SRIF participants and others in the Diocese concerned with the SRIF. In 2017, using dot-voting, the SAC polled Convention delegates again on their “SRI/Gospel Values priorities.” The 2014 results were confirmed and priorities expanded. The next poll has been postponed because the 2020 Convention will be held online, not in person.

Constructing and managing the SRIF Portfolio

The investment committee, with advice of Sellwood, its consultant, and in consultation with the SAC, uses the delegates’ SRI/Gospel value priorities to design and construct the SRIF portfolio. The positive investing values used now are *Climate & Clean Technology, Human Rights, Community Development, and Diversity/Equal Opportunity*. The negative ones are restrictions regarding *Pollution & Toxics, Human Rights, Executive & Exploitative Pay, and Animal Cruelty*. In

response to Convention, the investment committee allocated 0.7% of the SRIF portfolio to micro-finance investments in support of the SDGs.

By investment committee decision, both the DIF and the SRIF invest in pooled vehicles such as mutual funds. With such a vehicle, an investor cannot choose the securities in the pool. Thus, for the SRIF portfolio, the committee selects a pooled vehicle based on its judgment, informed by advice of Sellwood and the SAC, about how the vehicle's investment purposes, program and performance fit with the Diocese's SRI/Gospel value priorities. In fact, today numerous pooled vehicles have been created and are managed to focus on environmental, social and governance (ESG) issues and to apply sustainability analysis in managing assets. If a pooled fund does not perform as expected, the committee can sell it and choose one of the many others available.

At present the SRIF portfolio comprises mutual funds and one separately managed account. In setting the duties and responsibilities of the manager for that account, the committee applied the SRI and Gospel value priorities to define the Diocese's expectations.

Below is a table published by the Diocese on the SRIF's manager structure as of June 30, 2020.

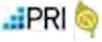
GOSPEL VALUE PRIORITIES

The SRIF seeks to incorporate the top socially responsible investing (SRI) and gospel value priorities identified via dot voting at the 2014 Convention, and most recently affirmed and expanded in 2017. These values encompass both positive investment, a proactive approach to socially responsible investing, and divestment, which is restriction-based. The Committee recognizes that, in isolation, each investment may not address all of the gospel value priorities, but the SRIF in whole will emphasize each of these priorities.

Positive Investing	Divestment
Investors direct money toward solution-oriented securities and invest in companies that have a positive social impact.	Investors restrict investment in certain securities based on SRI factors, excluding restricted securities from a portfolio.
 Climate & Clean Technology	 Climate & Clean Technology
 Human Rights	 Human Rights
 Community Development	 Community Development
 Diversity/Equal Opportunity	 Diversity/Equal Opportunity

INVESTMENTS

The Diocesan Investment Committee meets quarterly with the SRIF’s consultant, Sellwood Consulting LLC, to review the Fund’s performance, asset allocation and manager structure, including performance of the individual investment managers. The Investment Committee and/or Sellwood meet with each investment manager on an ongoing basis to discuss investment results, strategy, outlook for the future and any changes or issues within the firm or investment team.

Growth Investments		
U.S. Equity 42.0%		
	Parametric Responsible Investing	A separately managed U.S. equity portfolio optimized to track the Russell 3000 Index and meet the SRIF’s customized social screening criteria.
Non-U.S. Equity 14.0%		
	Boston Common ESG Impact Intl	A mutual fund that invests in non-U.S. companies with sound governance and responsible financial management, capable of consistent profitability.
Global Equity 12.0%		
	Pax Global Environmental Mkts	A mutual fund sub-advised by Impax that invests globally in companies in rapidly growing Resource Optimization markets.
Diversifying Investments		
Real Estate 3.0%		
	Third Avenue Real Estate	A mutual fund that employs a fundamental, value-oriented approach to construct a global real estate portfolio, that can invest in any industry, region or part of a firm’s capital structure.
Marketable Alternatives 4.3%		
	PIMCO All Asset Inst	A mutual fund with a “real return” strategy, investing tactically across PIMCO funds.
	BlackRock Multi-Asset	A mutual fund that tactically invests in income-oriented strategies across the globe.
Micro-Finance 0.7%		
	Craft3	A nonprofit community development loan fund that serves communities in OR and WA
Equity Risk Mitigation		
Fixed Income 22.0%		
	PIMCO Total Return ESG	A mutual fund that invests across all sectors of the bond market, with ESG-focused portfolio construction and robust issuer engagement.
	TIAA-CREF Core Impact Bond	A mutual fund that invests in U.S. bonds, focusing on undervalued, investment-grade securities and proactive social investments.
Cash 2.0%		
	United Nations Principals of Responsible Investing signatories	 Fossil-free investment

The above table identifies with a graphic symbol those investments in the SRIF portfolio that are “fossil-free.” With another symbol the table identifies the SRIF portfolio managers that are signatories of the UN Principles of Responsible Investing (PRI). Eight out of ten are signatories.

Over 90% of the SRIF portfolio funds and managers use ESG in their investment process. In fact, the only SRIF investments that are not chosen using ESG are in the asset classes *marketable alternatives, real estate, and cash*.

The Investment Policy Statement (IPS) adopted by the investment committee, most recently in February 2019, includes an Exhibit B specifically stating investment policy applicable to the SRIF. That policy statement sets out for managers the Diocese’s positive and negative SRI and Gospel value priorities as discussed above. Exhibit B to the IPS also provides: “In addition to providing data as is required for proper investment monitoring, managers for the SRIF will be expected to provide to the [investment] Committee on an annual basis a detailed report regarding how the portfolio was managed to further the SRI priorities outlined in this policy.”

In addition, the IPS states that the investment screens decided by the Episcopal Church and published from time to time by DFMS (the “no-buy” lists) apply for separately managed accounts for both the DIF and the SRIF. As indicated above, in the case of the SRIF, the separately managed account now in place has been set up to comply with the Diocese’s SRI and Gospel value priorities.

The IPS further provides that, for separately managed accounts, the Diocesan staff votes proxies for each security in the account, following the proxy voting policy adopted by DFMS, based on the work of CCSR, and implemented through the proxy voting service provided to Episcopal Church institutions by the Church Pension Group.

For pooled funds, the IPS provides, as it must, that the investment manager of the pooled fund votes proxies on behalf of all pooled fund investors. However, as noted above, pooled funds in the SRIF portfolio have been chosen by the investment committee because the funds’ purposes and investment programs fit with the Diocese’s socially responsible and Gospel value priorities. If the pooled funds purposes and programs are consistent with Diocesan value priorities, then voting proxies consistent with those purposes and programs also should be consistent with Diocesan value priorities. Indeed, in investing in such a pooled fund, the investment committee expected the fund managers to vote fund proxies consistent with the pooled fund’s purposes.

Although not explicitly required by the IPS, but consistent with the expectations of the investment committee, SRIF managers also actively take on shareholder engagement and advocacy efforts in respect of the assets under their management. In the case of mutual funds or other pooled vehicles, the investment committee expects the managers to engage and advocate consistent with the pooled vehicles’ purposes.

In addition to the environmental, social and governance results expected of the SRIF portfolio, good financial returns are expected. In fact, the SRIF portfolio has outperformed its peers financially since its 2016 inception. For the period the SRIF has returned 8.3% net of fees and ranks in the top 7% of similar sized institutional peers. The DIF, with a record of success dating back to 1992, has returned 7.5% net of fees and ranks in the top 18% of institutional peers.

Those engaged most closely with the SRIF intend to work to have the Diocese increase significantly its investment in the SRIF.

Episcopal Church in Vermont/Episcopal Diocese of Vermont

Investing for social and environmental sustainability in response to our Gospel imperative

Ethical Guidelines	ESG	Engmnt-Vote Prxies	Rspnsble Outcmes & Return
Yes	Yes	Yes	Yes

Background

In 1880 the Episcopal Church in Vermont/Episcopal Diocese of Vermont (Diocese) incorporated the Trustees of the Diocese of Vermont (the Trustees Corporation) to hold title to all diocesan real and personal property. The eight members of the governing board of the Trustees Corporation are styled “Trustees of the Diocese” or “Trustees.” The Bishop of the Diocese serves *ex officio* as a member of this board. On nomination of the convention Nominating Committee, the Diocesan Convention elects the other seven Trustees, one at each annual convention, to hold office for seven years. Three elected Trustees are appointed by the full board to serve as a corporate investment committee (the Investment Committee). The Bishop and the President of the Board of Trustees serve *ex officio* on the Investment Committee.

About 40 years ago the Trustees Corporation established the Diocesan Unit Trust Fund (the Fund), a pooled trust fund to hold and manage investment assets for the Diocese and its related institutions and for congregations and parishes and other entities in the Diocese that elect to invest in the Fund. The Investment Committee sets investment policy and oversees investment of the Fund’s assets. The Fund has a current value of about \$30 million, of which about \$10 million represents assets of the Diocese and its related institutions. The remainder, about \$20 million, represents assets of parishes, congregations and others investing in the Fund.

Around 2010 there began to be turnover in the membership of the Trustees (that is, the governing board of the Trustees Corporation) and thus in the Investment Committee. The newer members began to push the Fund toward engaging more seriously in socially and environmentally responsible investing. They undertook a multi-year effort to educate

themselves and then to change the Fund's approach to investing, to change its portfolio, and to report to the participants in the Fund and the people of the Diocese on what they proposed and what they were doing.

In 2016, in the most visible formal step toward such a new approach, the Investment Committee and Trustees adopted a new Investment Policy Statement (IPS) for the Fund. About the same time the Investment Committee undertook to engage an investment advisor specifically to operate under the IPS. Through these steps the Trustees and Investment Committee made substantial changes in the management of the Fund's assets. Since 2016 the Investment Committee and Trustees have continued to develop the Fund's approach to responsible investing, and they have revised the IPS, as needed, accordingly.

Our Gospel Imperative

One change introduced for the first time in 2016 and not altered since was the adoption by the Trustees of a statement of *Our Gospel Imperative*. The IPS includes the following declaration as the sole statement on its first page:

Our Gospel Imperative

We the Trustees of the Episcopal Diocese of Vermont believe that our foremost Gospel imperative is to be wise stewards of the resources under our care. Our first priority, therefore, is to ensure that Diocesan investments provide a growing and sustainable source of disburseable funds over the long term. We also believe that Diocesan resources can be a force for good in our world. Through our investments and actions, we seek to encourage corporate social responsibility; through targeted local investing, we seek to care for our neighbors.

Then, in its Statement of Objectives, the 2016 IPS set out two investment objectives.

First the IPS stated the following objective: to achieve "a long-term rate of return on assets that will generate earnings to provide a sustainable and increasing level of income to support the current and future ministries of the Diocese and its co-investors in accordance with the wishes of the donors or owners of those funds, while preserving the real (inflation-adjusted) purchasing power of the funds."

Immediately after the foregoing – explicitly linking this objective to the Gospel imperative – the IPS then stated the following: "to follow Environmental, Social and Governance (ESG) investing principles as a means of meeting our Gospel imperative." In the discussion of this objective the IPS went on to say that the "ESG investing principles used for the Fund will be updated whenever The Episcopal Church updates its own directives, in order to keep the principles of the Fund aligned with those of The Episcopal Church."

In its “Prohibited Securities” section, the IPS identified as “prohibited” the securities of companies found on the “no-buy” lists published from time to time by DFMS. The IPS attached the then current version of those “no-buy” lists in Exhibit B to the IPS. In response to a proposal adopted in Diocesan Convention, the IPS also included in the prohibited securities section the following “Additionally, the investment manager will avoid stocks of companies in the business of providing water for drinking or sanitation that abuse their monopolies or oligopolies over water sources, or distribution, or both.”

The provisions discussed above have been continued through subsequent revisions of the IPS.

Investing affirmatively for sustainable social and environmental outcomes

In 2019 the Trustees brought new affirmative substance to the Diocese’s investment policy. As a “clarification” of the Diocese’s policy, the Trustees added a new Exhibit C to the IPS.

In this exhibit, the Trustees declared that “It is the goal of The Episcopal Diocese of Vermont to invest in a manner that not only provides for sustained growth of the Fund and needs of The Episcopal Church, but also aligns with its values.” The Trustees then state: “To achieve these dual goals, we have implemented the following three-pronged approach to investing:”

1. **Impact Investing:** Alongside the goal of a financial return, is our desire to promote an economy that rewards social and environmental sustainability. This means investing in progressive companies that focus their efforts on making a positive impact and espousing the six U N Principles for Responsible Investing. By aligning the aspirational values of the Church with our investing strategy, we can help encourage a mindset of responsible business practices, as well as a future of all-encompassing prosperity. E.G.: Affordable Housing, Health Care and Potable Water, Renewable Energy, and Minority Owned Companies.
2. **Invest in our Community:** Where possible, it is our aspiration to invest in those companies that additionally benefit the local community. Vermont is a progressive state, which prioritizes environmental and social sustainability. While keeping the financial objectives stated in the IPS in mind, simultaneously boosting the local economy and communities where we live gives us the opportunity to approach aligning our financial goals with the values of the Church. E.G.: the Vermont Community Loan Fund and the Vermont Community Foundation.
3. **Proxy Voting:** After investing in a company or municipality, it is imperative to be active owners and ensure that their operations remain in line with the values of The Episcopal Church. To assist us with this objective, we will use the services of the Church Pension Group, which will facilitate a partnership with Glass Lewis & Co LLC, one of the largest

and most respected proxy advisory services in the world. They will perform the services under the guidelines of a Proxy Voting Policy published by The Episcopal Church.

Exhibits A and B to the IPS can be amended by the Investment Committee. This Exhibit C can only be amended by the full governing board, that is, the Trustees.

The Diocese already has invested in the Vermont Community Loan Fund, which makes loans to small business owners who cannot access credit from traditional sources. The Diocese is considering making an investment in the Vermont Community Foundation, which makes loans for affordable housing in the state.

In February 2020, the Investment Committee amended Exhibit B to the IPS to add the human rights exclusion (or screen) Executive Council adopted in October 2019 as a requirement for DFMS and a recommendation to other institutional investors in the broader Church. By so doing, the Investment Committee adopted this Executive Council recommendation as Diocesan investment policy. Exhibit B now sets out both the screen and the names of the companies put on the DFMS no-buy list by Executive Council. Thus, Vermont has adopted both the Executive Council screen and no-buy list:

Human Rights Investment Screen

Any corporation supporting or benefiting from denial of human rights consistent with policy adopted by General Convention or Executive Council, particularly;
Any corporation that supports or benefits from denial of human rights in or through the occupation of the West Bank, East Jerusalem or the Gaza Strip (the Occupied Palestinian Territories or OPT)

	<i>CUSIP</i>	<i>SEDOL</i>	<i>COUNTRY</i>
<i>Caterpillar Inc.</i>	<i>149123101</i>	<i>2180201</i>	<i>USA</i>
<i>Motorola Solutions, Inc.</i>	<i>149123101</i>	<i>B5BKPQ4</i>	<i>USA</i>
<i>Israel Discount Bank Ltd.</i>	<i>465074201</i>	<i>6451271</i>	<i>Israel</i>

Going forward, the Trustees and Investment Committee are undertaking further to educate themselves and their investment advisors to better understand and carry out the affirmative policies the Trustees and Committee have worked to define and adopt over the past decade.

Episcopal Church Context

Church Pension Fund

In response to actions of General Convention in 1913 and 1916, The Church Pension Fund (CPF) was established to provide pension benefits for clergy of the Episcopal Church. Since 1917 CPF has been the sponsor and administrator of the Church Pension Fund Clergy Pension Plan, a defined benefit plan. CPF also sponsors and administers pension plans for eligible lay employees, as well as a retirement savings plan, through which clergy and lay employees can save for their own retirement. Through CPF and affiliates of CPF other benefits and programs and services are provided to clergy and lay employees and Church institutions.

To meet the obligations under the pension and retirement plans CPF sponsors and administers, CPF holds and invests assets contributed by pension and retirement plan participants and their employers. In managing these pooled investment assets, CPF actively seeks investments that offer opportunities to realize attractive risk-adjusted returns, while also achieving important social goals and supporting Episcopal Church values, consistent with CPF's fiduciary obligations.

In its efforts to reflect Episcopal Church values in its investments, CPF has taken a proactive approach to socially responsible investing, focusing on a three-part strategy:

- *Investing for Positive Impact*

CPF proactively seeks out and invests with managers who deliver both strong returns and positive social and environmental outcomes. Examples of CPF's impact investments that support Church values include investments in renewable energy, affordable housing, and sustainable agriculture.

- *Shareholder Engagement*

CPF uses its position as an institutional investor to influence the behavior of companies in its investment portfolio. Working with Executive Council's Committee on Corporate Social Responsibility (CCSR), through shareholder engagement CPF has addressed issues such as diversity in corporations, human trafficking, and climate change.

- *Thought Leadership*

CPF shares its experience as an institutional investor and its industry relationships to create awareness of effective strategies in socially responsible investing. By collaborating with other investors, CPF helps advance industry best practices and increase investments in the space.

In addition to the three main strategies of socially responsible investing, CPF has engaged with many managers of pension assets to evaluate the extent to which they incorporate environmental, social, and governance (ESG) issues into their investment analysis. ESG issues may present material investment opportunities and risks and are part of fundamental investment analysis. In many cases, the ESG issues investors find material align with the values of CPF and its beneficiaries. Considering ESG factors can help drive long-term investment returns, consistent with fiduciary duty, while also supporting Episcopal Church values.

Episcopal Church Context

The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America

Investing on behalf of the Episcopal Church to support and to carry out its Mission

The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America (DFMS) is the New York not-for-profit corporation that holds and manages real and personal property for the Episcopal Church. Accordingly, DFMS holds and manages the Church's investment assets. (As described in the note at the end of this section, DFMS also holds in a custodial relation and manages investment assets that are owned by some distinct entities related to the Church and to DFMS, such as dioceses of the Church.)

As its original rather long name indicates, DFMS was incorporated to carry out "missionary" programs or activities on behalf of the Episcopal Church, both within and without the United States. To that broad end, as an incident to carrying out such programs and activities, DFMS was empowered to hold and manage property for the Church and others, as it does to this day.

Regarding investments, DFMS's principal responsibility is to hold assets for the Church in the name of DFMS and to invest them to support the Church's purposes and programs and to carry out its mission. The DFMS Investment Policy Statement as revised (as of June 2020) (the IPS) states DFMS's investment "objective" as follows: "The investment objective is a long-term rate of return on assets that will generate earnings to provide a sustainable and increasing level of income *to support the current and future ministries of the Episcopal Church in accordance with the wishes of the donors or owners of those funds*, while preserving the real (inflation-adjusted) purchasing power of the funds." (Emphasis supplied.) While the IPS principally focuses on the DFMS portfolio from the point of view of traditional professional investment management for financial return, the IPS also references ethical investment policies established by General Convention and Executive Council; see the discussion, below, of Exhibits B and D to the IPS.

The arrangements adopted by General Convention and Executive Council for DFMS to employ in carrying out its investment responsibilities have evolved in the last half century. Now these responsibilities have been shared among three committees of Executive Council: the Investment Committee, which manages the DFMS portfolio, the Economic Justice Loan Committee, which administers a community development loan fund on behalf of DFMS, and the Committee on Corporate Social Responsibility, which engages with DFMS portfolio companies on ethical concerns of the Church. Each committee is discussed in turn below.

Managing the Portfolio – the Investment Committee

Until Executive Council changed its bylaws in 1997, the committee responsible for investing DFMS assets was known as the “Trust Funds Committee.” When committee members expressed concern that the committee name and job description might be construed to make them liable as trustees in the legal sense for their actions as committee members, Council agreed to revise its bylaws. The revisions provided that the newly re-named committee had responsibilities and powers appropriate for an investment committee of a New York not-for-profit corporation, such as DFMS in fact is, and that committee members would be indemnified by DFMS in accordance with law with respect to their actions as such. Since then the Committee has functioned under the revised bylaws as a corporate investment committee.

The assets DFMS holds for which the Investment Committee provides investment oversight have a value of about \$500 million. The total has three components: (1) assets owned, held and managed by DFMS and benefiting DFMS, representing about \$262 million of the total (DFMS’s own assets); (2) assets owned, held and managed by DFMS as trustee, benefiting other Episcopal/Anglican entities, representing about \$109 million of the total (trust assets); and (3) assets held and managed by DFMS as custodian but owned by and benefiting other Episcopal/Anglican entities, representing about \$129 million of the total (custodial assets). An example of assets of the second sort would be assets held by DFMS as trustee of a trust set up for the benefit of a diocese located in the U.S. or another country. Custodial assets are discussed in the note at the end of this section.

The distinctions given immediately above are significant for the institutions involved and their missions, but for investment purposes, all these assets are treated alike, as a single pool. As stated in the quote taken from the DFMS IPS set out in the third paragraph above, all these assets are invested together *“to support the current and future ministries of the Episcopal Church in accordance with the wishes of the donors or owners of those funds.”* About 14% of this \$500 million pool is invested in hedge funds; the target for hedge funds is 16%. The remainder, over 80%, is held in publicly traded securities. These assets include no impact or community investments. The Economic Justice Loan Committee, discussed below, administers a separate pool of DFMS endowment assets set aside for impact or community investments.

The DFMS IPS references ethical concerns of the Church in two exhibits attached to and incorporated into the IPS. Exhibit B sets out *Fossil Fuel Investment Guidelines* and *Human Rights Guidelines*. Exhibit D sets out *Companies Subject to No-buy Portfolio Restrictions*. The two exhibits overlap somewhat. Their content derives from decisions on ethical issues expressed in resolutions adopted by General Convention and Executive Council.

As discussed below in regard to the Committee on Corporate Social Responsibility, DFMS now has in place portfolio restrictions – or divestment policies – adopted by Convention and Council

with respect to ownership of shares in companies implicated in five issues of concern to the Church. These are defense contracting, for-profit prisons, the manufacture and sale of tobacco products, fossil fuels, and supporting or benefiting from denial of human rights. IPS Exhibit D sets out summaries of these policy decisions by Convention and Council and identifies the companies and securities comprising the no-buy lists developed under these policies.

Exhibit B, as noted above, discusses only two of these five subjects of divestment policy, those regarding fossil fuel and human rights concerns. This exhibit provides a statement of the policy decisions of the Investment Committee in response to the General Convention and Executive Council actions that set up the divestment policy in question. This human rights policy discussion largely echoes the decisions made in 2019 by Executive Council to implement a 2018 General Convention resolution on adopting a human rights “screen” for investing.

The Exhibit B fossil fuel policy discussion identifies the Investment Committee’s decisions made to implement the directives of General Convention resolution 2015-C045 (calling for fossil fuel divestment by DFMS). The exhibit then does somewhat more than speak to divestment.

Under the heading *Fossil Fuel Investment Guidelines*, this is the one place in the IPS that references “(ESG),” or the application of *environmental, social and governance factors* in investment management decisions. With respect to ESG, in this discussion the exhibit says the Investment Committee “will monitor fund holdings for compliance with” the *ESG ratings* promulgated by DFMS’s investment consultant, Mercer Investment Consulting LLC. This discussion goes on to say that the Committee will allow DFMS investment in companies and investment vehicles meeting Mercer’s ratings “ESG1 and ESG2 without hesitation; ESG3 with approval; and ESG4 only if justifiable after thorough review.” On its face, this part of the discussion does not refer to fossil fuel divestment at all.

Moreover, in this section Exhibit B also says the Investment Committee will to “continue to review investment managers that provide ESG and alternative energy themes.” In fact, General Convention resolution 2015-C045 did more than call for divestment. Resolution C045 said DFMS should “divest from fossil fuel companies *and reinvest in clean renewable energy.*” (Emphasis supplied) Thus it appears that, in deciding how to comply with the directive to reinvest in renewable energy, the Committee decided to look to application of ESG factors.

Taken together these two references to ESG in Exhibit B suggest that the exhibit is about more than fossil fuel and human rights investment guidelines. The references suggest the Investment Committee may undertake a more general application of ESG factors as the Committee constructs a portfolio or considers hiring new investment managers.

Because the three components (DFMS’s own assets, trust assets and custodial assets) that comprise the assets under management by the Investment Committee are all invested in one pool, the investment policies embodied in Exhibit B and Exhibit D apply to all of them without

distinction. Thus, the divestment policies or portfolio restrictions apply to all such assets. Moreover, insofar as the Investment Committee may seek to apply ESG factors in managing the pool, any such use of ESG factors will perform apply to all three components.

Investing for Economic Justice – the Economic Justice Loan Committee

Over three decades ago, by separate actions of General Convention in 1988 and Executive Council in 1989, the Episcopal Church set aside two amounts of endowment assets to support economic justice investment. In 1997 Executive Council united these two efforts into one and created the Economic Justice Loan Committee (EJLC) to oversee the combined program.

Through these actions, the Episcopal Church has committed \$7 million in its endowment assets for economic justice initiatives around the globe and in the United States. By making financial resources and technical support available in communities that have limited or no access to credit and related financial services and education, the Church supports those communities' efforts to improve their economic well-being and simultaneously helps them empower themselves to direct and control their own economic and organizational development.

In this time the Church has supported, through investments managed by EJLC, many sorts of community economic justice development programs and projects. These have included affordable housing, the creation and growth of small businesses and micro-enterprises, social and environmental infrastructure improvement projects, programs for job creation, and the provision of social services and education, including child care programs.

EJLC administers this \$7 million in DFMS endowment funds as a loan portfolio. The funds in the portfolio are used on a revolving basis to provide loans, indirectly, to organizations, institutions and individuals that may not qualify in the regular credit markets but have worthy community economic justice development programs and projects. The principal, upon repayment to DFMS, is re-loaned by DFMS to others through the program administered by EJLC. All the loans pay interest, and that interest income is used to support DFMS's program budget.

EJLC loans generally range in size from \$100,000 to \$300,000 and may be as large as \$500,000. EJLC makes no loan unless the appropriate diocesan bishop approves in advance.

The EJLC program does not lend directly to the end users of the funds but *only* to financial intermediaries such as community development loan funds or community development credit unions. These intermediaries, commonly called Community Development Financial Institutions (CDFIs), themselves re-lend the monies provided by DFMS to groups, organizations and individuals with needs to finance community economic justice development programs and projects. Many CDFIs operate in the United States, and many operate globally.

Spreading the EJLC loans among multiple intermediaries has several advantages for the Church. The CDFIs are in the business of providing community development loans and have professional

staffs to support their end-user borrowers; CDFIs generally have the scale to handle large numbers of borrowers. The Church is not in that business and has no such staff or capacity. These intermediaries also typically provide financial training and technical and management assistance along with financial capital to their borrowers – all services that the Church is not equipped to provide. Finally, spreading EJLC’s loans over a number of experienced CDFIs greatly reduces risk to DFMS’s economic justice loan portfolio. Through years of carrying on their businesses, CDFIs develop track records that EJLC can evaluate. The CDFIs, not DFMS, directly bear the risk of losses on loans to the end-users of this capital, and the CDFIs generally are well positioned to take steps to intervene and prevent or reduce any such losses.

Here are examples of investments made by DFMS through the program overseen by EJLC:

- To support community economic development in the Holy Land, DFMS has made a \$500,000 deposit with the Bank of Palestine, earmarked by the Church for creating and supporting small businesses in the Palestinian community, especially businesses owned by women.
- To support community economic development among Native Americans, DFMS has made a \$200,000 loan to Four Directions Development Corporation(FDDC), a community development corporation organized and operated in Maine by the Passamaquoddy Tribe, the Penobscot Nation, the Houlton Band of Maliseet, and the Aroostook Band of Micmac. Principally, FDDC serves the community financial needs of members of these tribes and their families.
- To support community economic development in South Africa, DFMS has made a loan of \$300,000 to Shared Interest, a U.S. based fund that guarantees loans by South African banks to members of low-income communities in South Africa to enable them to construct houses, launch small businesses and create jobs.

The discussion below on the Committee on Corporate Social Responsibility (CSR) reports that in 1997 Convention passed a resolution encouraging “corporations” to invest in South Africa, to help rebuild the economy after apartheid. As noted above, EJLC was formed in 1997. The first loan EJLC approved was a \$500,000 TEC loan to support economic development in South Africa.

Engagement on Faith Issues with Companies in the DFMS Portfolio – the Committee on Corporate Social Responsibility

In May 1971 Presiding Bishop John E. Hines stood up at the General Motors annual meeting to present the first ever shareholder resolution by an investor of faith. On behalf of DFMS, Bishop Hines called on GM to stop doing business in South Africa. That was the opening move by investors in support of the wider effort to end apartheid. The year 2021 marks the 50th anniversary of that historic first step in the Church’s public ministry for corporate responsibility.

The 1971 shareholder resolution was drafted for the Church by the Committee on Social Criteria for Investments, a committee of Executive Council appointed by Bishop Hines in 1970. That committee is the direct ancestor of Executive Council's current Committee on Corporate Social Responsibility (CCSR).

CCSR and its predecessors have worked continuously since 1970 on behalf of the Church using the tools of shareholder advocacy with companies, including engagement through correspondence and meetings, voting proxies, and filing shareholder resolutions and supporting those filed by other ethical investors. In this advocacy CCSR asserts and applies the Church's ethical teachings as expressed in resolutions on social and environmental justice issues adopted by General Convention and Executive Council. From the beginning of this ministry down to today, CCSR has helped shape the advocacy it undertakes for the Church, but CCSR implements existing Church policy and does not make policy. The companies held in the portfolio have been chosen by investment managers in accordance with policies adopted by the Investment Committee or General Convention or Executive Council. CCSR has done its advocacy solely based on the securities from time to time held in the DFMS portfolio.

In 1973 the Episcopal Church, through CCSR, was a founding member of the Interfaith Center on Corporate Responsibility (ICCR). ICCR has become the premier interfaith investor advocacy group in North America – its members file around 300 shareholder resolutions each year. Since its founding, ICCR and its members have been at the center of engagement by investors on every social, environmental and governance (ESG) issue that investors have sought to address with the companies they own – from apartheid to equal employment opportunity, from civil and human rights to weapons (including military arms and guns sold to individuals), from tobacco to opioids, from access to health care to sex trafficking and labor trafficking, and from the UN Sustainable Development Goals to climate change.

The Church's public ministry for corporate responsibility was supported from 1970 to 2009 by volunteers, dedicated staff and outside expert consultants. However, during the time of the great recession, in 2009 CCSR's budget was entirely defunded. From that time until 2016, all CCSR's work was carried out solely by volunteers. The Church discontinued its ICCR membership but was able to carry on some work with ICCR through efforts of CCSR volunteers and access kindly provided by the Church Pension Group under its ICCR membership.

In 2016 the President of the House of Deputies noted a decline in CCSR's work and appointed seasoned members to help resuscitate the committee. Shortly thereafter the Presiding Bishop acted, with the help of the Treasurer, to find funding for DFMS to engage consulting help for CCSR. DFMS subsequently engaged the highly professional Mercy Investment Services, Inc., a ministry of the Sisters of Mercy of the Americas, a Roman Catholic congregation of women.

Mercy Investment Services provides shareholder advocacy services to help its several clients carry out plans the clients develop to implement their own policies.

At the 2018 General Convention, the legislative committee responsible for socially responsible investing, noting the importance of the Church's public ministry for corporate responsibility and acting on its own, proposed resolution A296, which Convention adopted. A296 directed Executive Council to maintain an independent membership in ICCR and to treat "expenses associated with this membership, as well as on-going socially responsible investment consulting fees, as investment management expenses, rather than program expenses." In 2018 the Church resumed its ICCR membership. ICCR noted and celebrated the Church's return.

Over the 50 years of the Church's public ministry for corporate responsibility, with respect to certain issues and companies engaged in certain businesses or activities, General Convention and Executive Council from time to time have adopted divestment as a policy for the Church and have directed DFMS to divest. The Church began its divesting with South Africa.

The Church worked from the 1970s to the 1980s advocating with companies, governments and other investors for action to end apartheid. In the 1980s international sanctions were imposed on the government in South Africa. In 1985 General Convention "mandated" that DFMS "divest all holdings in companies doing business in South Africa and Namibia." In the 1990s, with the end of apartheid and with a new constitution and government in South Africa, international sanctions were lifted. In 1997 General Convention passed a resolution that "the Church now advocates for the rebuilding of South Africa's and Namibia's economic infrastructure and further encourages ... corporations to consider investing there in support of economic opportunity and in the context of social responsibility."

Following its experience applying divestment in the context of apartheid, General Convention and Executive Council have adopted divestment policies – or portfolio restrictions – with respect to ownership of shares in companies implicated in five other matters of concern. These are defense contracting, for-profit prisons, the manufacture and sale of tobacco products, fossil fuels, and supporting or benefiting from denial of human rights.

As Convention and Council have widened the scope of the Church's ethical policy statements, CCSR has extended its advocacy in support of those policies. Currently, CCSR advocates with companies on human rights, sex and labor trafficking, health concerns (including gun safety), diversity in corporate America and care of creation and climate change. Responding to a 2018 Convention action, in 2019 Council caused DFMS to invest in publicly traded companies in the gun and ammunition industry in order to try to induce the companies to enhance gun safety.

Note on Investing on behalf of other Episcopal Church entities

DFMS offers the opportunity for any entity related to the Episcopal Church, including any parish, diocese, school or other organization, to enter into a voluntary custodial arrangement with DFMS to invest “along-side” DFMS in the pool of investment assets managed by DFMS. This pooled investment arrangement or program (the Program) is available at no cost to an eligible entity, except for the entity’s pro-rata share of the investment fees and costs otherwise charged to the pooled portfolio as a whole.

No amount is too small – DFMS has new accounts with \$500 invested – or too large. The DFMS database system also can handle multiple accounts and sub-accounts for a single owner. Apart from having a recognized relationship to TEC and entering into an agreement to abide by the terms of the arrangement, the only requirement is that an entity wishing to participate in the Program be recognized as a tax-exempt charitable organization within the meaning of Section 501(c)(3) of the Internal Revenue Code.

The Program is intended to provide eligible TEC entities with the ability to place their assets in a pool with the investment assets to which DFMS holds title and to have DFMS manage the investment of all the pooled assets together. The arrangement is intended to provide participating entities with the advantages of professional investment management and economies of scale possible with investing in a pool of assets.

Eligible entities should understand that the DFMS pool is managed to achieve DFMS’s stated investment objectives, which may not be the same as the entity’s, and that neither DFMS or the Program can or will attempt to meet any particular participant’s investment objectives.

In addition, eligible entities should understand that the pool is managed by DFMS in accordance with ethical investment policies adopted by General Convention or Executive Council for DFMS to follow, and not in accordance with any other ethical investment policies, whether adopted by an eligible entity or another. Further, the DFMS pool now includes no impact or community investing investments. The endowment assets invested by EJLC in community development loans are in a separate fund, not in the portfolio, and entities investing through the Program will not be investing in such fund of community development investments.

Entities interested in considering participation in the Program should contact the Director of Investment Management and Banking in the Finance Office of the Episcopal Church. [Click here for The Finance Office | Episcopal Church](https://www.episcopalchurch.org/finance-office/) (<https://www.episcopalchurch.org/finance-office/>)

Episcopal Church Context

Episcopal Church Foundation

The Episcopal Church Foundation (ECF) was founded in 1949 under the leadership of Presiding Bishop Henry Knox Sherrill to be an independent lay led organization for the support of the Episcopal Church and its work. Since 1969 ECF has been recognized by the Internal Revenue Service as a tax-exempt charitable organization as described in Section 501(c)(3) of the Internal Revenue Code. Over the years the focus of its programs has evolved, but ECF has retained its commitments to lay leadership and to serving the Church.

In 1995 ECF became the entity within the Episcopal Church to have primary responsibility for planned giving throughout the Church. At this time, ECF began a new commitment to stewardship and philanthropy, to raising financial resources for ministry, and to planning and leadership development for Episcopal churches, dioceses, schools and church-related organizations. In addition to providing resources and services to support parish planning and financial and investment management, ECF's programs include resources and services for stewardship, donor and capital campaigns tools and planned giving. ECF also provides endowment management for Church institutions through an arrangement with State Street Global Advisors (SSGA). In addition, ECF holds educational and training events, participates in events organized by others, and publishes resources in traditional formats and on-line.

As part of its mission to serve the Episcopal Church, ECF provides a comprehensive program of investment management services for Church investors. ECF advises institutional investors on all aspects of endowment management, including structure, operating policies and governance, and spending rules and donor restrictions. ECF will work with an institution to assist with any investment concern it may have, including helping it clarify its objectives, educate committee members or review possible portfolios. ECF also helps create or update investment and spending policies, with the goal of helping Church institutions use their long-term assets, as intended, for mission and ministry. And, for some years, as the field has grown, ECF has been advising institutional investors regarding adopting responsible investing and applying an environmental, social and governance (ESG) approach in managing their investment assets.

Recently ECF has brought its responsible investing and ESG experience, and that of the ecumenical community, to a wider audience. *Faithful Investing*, edited by James W. Murphy of the ECF staff and published in 2020 by Church Publishing, has given the Church a valuable resource in a widely accessible format. Through a collection of essays by investment experts and practitioners from across the ecumenical community, *Faithful Investing* clearly and concisely delivers information and insights that can help Church folk identify, and also answer, important questions about responsible investing and using ESG. Whether an institution has a developed understanding or has just begun to address the matter, these essays can provide

balanced guidance for considering whether and how to undertake responsible investing, and, if the institution decides to do it, how to define and adopt a policy and then execute a program.

As noted above, ECF contracts with State Street Global Advisors, one of the largest institutional fund managers in the world, to offer Episcopal Church institutions of all sizes a variety of investment choices for their endowment and permanent funds. This collective investment program offers ECF clients broadly diversified investment options across asset classes, and at low cost. The minimum size for an ECF account managed by SSGA with socially responsible options is \$100,000; without such options, the minimum is \$10,000. The assets of Church institutions invested under SSGA management through ECF total about \$460 million.

SSGA is a signatory of the UN Principles for Responsible Investment (PRI) and seeks to fulfill the commitment to responsible investment it has made. ECF and SSGA offer two approaches to responsible investing. Whether or not an investing organization wishes to have any positive or negative screens applied to a portfolio in which it invests, as a PRI signatory SSGA has a comprehensive program, called *Asset Stewardship*, for engagement with companies in all SSGA portfolios. Applying a number of tools, SSGA assesses the ESG performance of portfolio companies and engages with them as SSGA deems appropriate to encourage sound ESG practices. When appropriate, SSGA votes its proxies on ESG issues.

In addition, ECF and SSGA offer three options for Church institutions that wish to invest in portfolios that are specifically screened. ECF clients may choose from portfolios screened (i) more specifically for ESG issues (including entirely excluding tobacco and certain weapons, firearms and fossil fuel companies), (ii) to be fossil fuel reserve-free, or (iii) for certain social issues. ECF and SSGA will assist any Episcopal Church institutional investor considering such a screen to understand the principles followed in applying the screen and the effect of using it.

Church institutions concerned with responsible investing and ESG, and considering investing with ECF and SSGA, should understand that SSGA's *Asset Stewardship* program is based on an ESG scoring system, engagement priorities and proxy voting guidelines developed by SSGA's asset stewardship experts. The socially responsible portfolios are based on screens developed by SSGA or other asset managers. These guidelines and screens can be expected to address issues considered by General Convention or Executive Council, but they are not based on ethical policies or decisions adopted by Convention or Council. More information is available from ECF.

Church institutions interested in considering having ECF and SSGA manage their endowments should contact ECF at endowment@episcopalfoundation.org.

Anglican Communion Context

Church of England

National Investment Bodies

The Church of England (C of E or the Church) has three sets of “national” investment assets and three entities to hold and manage them. These are the *National Investment Bodies* or *NIBs*. The three NIBs together hold and invest a total of about \$16.5 billion in assets for the Church.

Each NIB independently manages the assets it holds. To assure it acts in accord with a common understanding of how to apply the Church’s faith in investment management, each NIB undertakes to adopt and follow ethical policies *recommended* by the C of E’s *Ethical Investment Advisory Group (EIAG)*. Each NIB has representation in the EIAG and participates in its work.

Here are brief descriptions of each of the NIBs:

- *The Church Commissioners for England (Commissioners)*

The Commissioners hold and invest a total of about \$11 billion in assets.

Parliament created the Commissioners in 1948 by combining two long existing predecessors. The Commissioners hold and manage assets that originate centuries ago in the Church’s then very extensive real property holdings. (One predecessor, the *Bounty of Queen Anne for the Augmentation of the Poor Clergy*, was formed in 1703, just two years before Queen Anne gave Trinity Wall Street the 215 acres of land on Manhattan Island known as the King’s Farm.)

Since 1948 the Commissioners have greatly diversified their holdings, and now, while they still own much real estate, the bulk of their holdings is in financial assets such as stocks and bonds.

To support parish ministry, bishops, and cathedrals, the Church Commissioners distribute grants to the Church amounting to about \$300 million annually, representing about 15% of the Church’s annual revenue. (Parishes provide about 75% of annual funding for the C of E.)

As the full name of *Queen Anne’s Bounty* may suggest, the Commissioners and their predecessors historically have provided stipends and housing to active and retired C of E clergy. In 1997 Parliament approved a new pensions scheme to be supported, going forward, by contributions of parishes and other employers. The Commissioners

remain responsible to pay clergy pensions that were earned through 1997 and also to provide clergy housing.

<https://www.churchofengland.org/about/leadership-and-governance/church-commissioners>

- *The CBF Church of England Funds (Funds)*

The Funds hold and invest a total of about \$2 billion in assets.

The Funds were set up in 1958 to provide an integrated investment service for parishes, dioceses, cathedrals and other C of E bodies with their own investment assets. The Central Board of Finance (CBF) has been trustee of the Funds since inception. (The CBF membership is coextensive with that of the Archbishops' Council; the Council, headed by the two Archbishops, is the highest executive body in the C of E, intended to give the Church strategic direction.)

<https://www.churchofengland.org/sites/default/files/2018-10/g1640-trusteeship%20of%20the%20cbf%20cofe%20funds.pdf>

- *The Church of England Pensions Board (Board)*

The Board holds and invests a total of about \$3.7 billion in assets.

The Board administers the pensions scheme created in 1997 and is responsible to pay pensions earned after that year, funded by parishes and employers, and to provide clergy housing.

<https://www.churchofengland.org/about/leadership-and-governance/church-england-pensions-board>

Ethical Investment Advisory Group

In 2018 the NIBs approved a set of *Terms of Reference* to define their relationship to the EIAG:

The EIAG is an Advisory Group convened and funded by [the NIBs]. ...

The EIAG's purpose is to support the NIBs to invest ethically in a way which is distinctly Christian. This shall be achieved by offering timely and practical Advice and support to the NIBs, who shall formulate policy. ...

Such Advice shall be grounded in Christian theology. ...

The EIAG shall have no investment powers and may act only in an Advisory capacity in accordance with its purposes as described above. Advice given by the EIAG shall not be

binding on the NIBs, and the adoption of any Policies drafted as a result of the EIAG's Advice shall remain the responsibility of each NIB.

<https://www.churchofengland.org/sites/default/files/2019-02/EIAG%20Terms%20of%20Reference%20agreed%202018f.pdf>

On recommendation of the EIAG, in 2018 the NIBs also adopted a *Statement of Ethical Investment Policy* (Ethical Policy) that further specifies the framework for ethical investing by the NIBs. The Ethical Policy describes the function of the EIAG as follows:

The NIBs receive advice and support on ethical investment from the Church's Ethical Investment Advisory Group (EIAG). *The purpose of the EIAG is to enable the NIBs to act as distinctively Christian – and Anglican – institutional investors. [Emphasis supplied]* The EIAG develops ethical investment policy recommendations which, once agreed by the NIBs, are adopted by them, communicated to the wider Church and implemented.

The EIAG consists of representatives of the NIBs, General Synod [analogous to General Convention], the Archbishops' Council and the Mission and Public Affairs Council [see note below], and certain co-opted members. Legal responsibility for all investment decisions rests solely with the NIBs.

Regarding the NIBs, the Ethical Policy states:

The NIBs operate within the legal framework for investment by charities and pension funds. They owe certain fiduciary and other duties to their beneficiaries. Christian stewardship provides the context within which and informs the manner in which these duties are performed.

The NIBs are signatories to the United Nations Principles for Responsible Investment (PRI) under which institutional investors pledge to incorporate environmental, social and governance (ESG) issues into investment analysis and decision-making processes, and to be active owners, across all asset classes.

The NIBs recognize climate change as a distinct ethical investment issue and invest in line with a climate change policy. ...

The NIBs expect companies in which they invest to manifest sustainable environmental practice, fair treatment of customers and suppliers, responsible employment practices, conscientiousness with regard to human rights, sensitivity towards the communities in which they operate and best corporate governance practice. The NIBs engage with investee companies to seek improvement in ethical standards in these areas. ...

The NIBs do not wish directly to profit from, or provide capital to, activities that are materially inconsistent with Christian values, and are also mindful of the danger of undermining the credibility, effectiveness and unity of the Church's witness were they to do so. A range of investment exclusions is therefore maintained.

The EIAG may, exceptionally, recommend exclusion from investment of any individual company in any line of business on ethical grounds - normally if, after sustained dialogue, the company does not respond positively to EIAG concerns about its practices. In such cases the NIBs will determine individually whether to disinvest if they hold securities issued by the company.

<https://www.churchofengland.org/sites/default/files/2019-01/Statement%20of%20Ethical%20Investment%20Policy%20-%20October%202018%5B1%5D.pdf>

The EIAG has recommended, and the NIBs have adopted, several ethical investment policies in addition to the general Ethical Policy quoted above. The EIAG website describes these as follows: "The policies we recommend to the NIBs are the basis for a distinctly Christian approach to investment, embracing screening, active stewardship, and alignment with the Church's teaching and values. The NIBs' overall approach to ethical investment is described in their Statement of Ethical Investment Policy [*i.e.*, the Ethical Policy quoted above]."

After that description, the EIAG website lists and provides links to 20 separate ethical investment policies, ranging in subject matter from the *Alcohol Policy* to the *Climate Change Policy*, from the *Executive Remuneration Policy* to the *Extractive Industries Policy and Advice*, and from the *High Interest Lending Policy* to the *Supply Chain Engagement Framework*.

<https://www.churchofengland.org/about/leadership-and-governance/ethical-investment-advisory-group/policies-and-reviews>

Generally, the EIAG statements recommending such policies include discussion of matters of faith. For example, the EIAG Advisory Paper supporting the *Climate Change Policy* (which deals at some length with a major and contentious issue within the C of E) includes four pages of Biblical, theological and ecclesiological "reflections" -- in moderately small type.

<https://www.churchofengland.org/sites/default/files/2017-11/Climate%20Change%20Policy%20.pdf>

As mentioned above, the Mission and Public Affairs Council of the Church of England (M&PA Council) is represented on the EIAG. In submitting comments for a public inquiry into editing the human genome, the M&PA Council described itself as follow:

The Mission & Public Affairs Council of the Church of England is the body responsible for overseeing research and comment on social and political issues on behalf of the Church. The Council comprises a representative group of bishops, clergy and lay people with interest and expertise in the relevant areas, and reports to the General Synod through the Archbishops' Council. The Mission and Public Affairs Council presents a Christian ethos, drawing on the witness of the Christian Scriptures and reflecting on Christian tradition and contemporary thought. Belief in God as Creator and Redeemer, in human beings' intrinsic value as creatures made in the Image of God and in the imperatives of love and justice, underpins the Council's approach. The Council believes that the ethical and social principles developed from this foundation have a value and relevance in society that can be acknowledged by those of other faiths or none.

https://www.nuffieldbioethics.org/assets/pdfs/genome-editing-evidence-Mission-and-Public-Affairs-Council_Church-of-England.pdf

Afterword

Sustainable Development Goals

We are faced not with two separate crises, one environmental and the other social, but rather with one complex crisis which is both social and environmental. Strategies for a solution demand an integrated approach to combating poverty, restoring dignity to the excluded, and at the same time protecting nature.

Pope Francis, *Laudato Si'*, Encyclical Letter of the Holy Father Francis

On Care for Our Common Home, ¶ 139 The Holy See, May 24, 2015

SDGs Adopted by the United Nations General Assembly, September 25, 2015

SDGs Endorsed by General Convention, Resolution 2018-B026, July 12, 2018

- Goal 1. End poverty in all its forms everywhere
- Goal 2. End hunger, achieve food security and improved nutrition and promote sustainable agriculture
- Goal 3. Ensure healthy lives and promote well-being for all at all ages
- Goal 4. Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
- Goal 5. Achieve gender equality and empower all women and girls
- Goal 6. Ensure availability and sustainable management of water and sanitation for all
- Goal 7. Ensure access to affordable, reliable, sustainable and modern energy for all
- Goal 8. Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all
- Goal 9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
- Goal 10. Reduce inequality within and among countries
- Goal 11. Make cities and human settlements inclusive, safe, resilient and sustainable
- Goal 12. Ensure sustainable consumption and production patterns
- Goal 13. Take urgent action to combat climate change and its impacts*
- Goal 14. Conserve and sustainably use the oceans, seas and marine resources for sustainable development

- Goal 15. Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
- Goal 16. Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
- Goal 17. Strengthen the means of implementation and revitalize the global partnership for sustainable development

* Acknowledging that the United Nations Framework Convention on Climate Change is the primary international, intergovernmental forum for negotiating the global response to climate change.

Acknowledgements

Many people have helped subcommittee #3 of the Task Force on Theology of Money carry out its work. None of them is responsible for what the subcommittee has written. The Task Force and subcommittee alone are responsible for this report.

The most important people to acknowledge are the leaders and staff members of the more than twice times fifteen institutional investors who allowed us to interview them and, often, review their institutional documents and talk to their professional advisers. Some were clergy. Most were lay people. Many were volunteers working to help their parishes or dioceses manage their investments faithfully. There are more than we can name. We are grateful for their help to us, their commitment to their institutions, and their support for faithful investing.

Three individuals and organizations deserve special mention.

The Rev. Canon Dr. Michael Barlowe and his staff in the Office of the General Convention provided support that made it possible for a member of the Task Force to attend the 2020 Annual Gathering of the CEEP Network (Consortium of Endowed Episcopal Parishes or CEEP).

Joseph Swimmer, Executive Director of CEEP, and his staff made us welcome and helped with meetings and interviews, as well as advice and communications before and after the Gathering.

JoAnn Hanson, President and CEO, Church Investment Group, provided introductions to investors across the Church as well as information, documents and wise counsel.

We thank the chairs of Executive Council's Economic Justice Loan Committee, Investment Committee, and Committee on Corporate Social Responsibility, who welcomed our inquiries

and shared their insights. We also thank the staff members of the Church Pension Fund, the Domestic and Foreign Missionary Society, the Episcopal Church Foundation and the Church of England Pensions Board who patiently gave us the benefit of their knowledge and experience.

Finally, the convener gives personal thanks to an old friend, Amy Domini, who, through her connections in responsible investing, enabled us to make contact with three institutions we might not have found. The stories of those faithful investors are vital parts of our report.

Committee Members

The members of Task Force subcommittee #3 are:

The Rev. Candice Frazer, Diocese of Alabama,

The Rt. Rev. Gayle Harris, Diocese of Massachusetts,

W.B. McKeown, Diocese of New York, convener, and

Douglas Walker, Diocese of Florida

TASK FORCE ON THEOLOGY OF SOCIAL JUSTICE ADVOCACY

Membership

Ms. Sarah Lawton, <i>Chair</i>	California, VIII	2021
The Rt. Rev. Prince Singh, <i>Vice-Chair</i>	Rochester, II	2021
The Rt. Rev. Andrew Dietsche	New York, II	2021
Ms. Ruth Frey	New York, II	2021
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2021
Prof. Brant Lee	Ohio, V	2021
The Rev. Deacon Guy Leemhuis	Los Angeles, VIII	2021
Ms. Lallie Lloyd	Massachusetts, I	2021
Dr. Dora Mbuwayesango	North Carolina, IV	2021
The Rev. Jose Rodriguez-Sanjuro	Central Florida, IV	2021
Dr. Reuben Varghese	Washington, III	2021
The Rev. Susanne Watson Epting	Iowa, VI	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-A056 Create Task Force on the Theology of Social Justice Advocacy as Christian Justice

Resolved, the House of Deputies concurring, That the 79th General Convention direct the Presiding Bishop and the President of the House of Deputies of The Episcopal Church to appoint a Task Force on the Theology of Social Justice Advocacy as Christian Ministry, consisting of three (3) bishops, three (3) presbyters or deacons, to include both orders, and six (6) lay persons, who represent the diversity of the Church, to be tasked in this triennium to consider scripture, approved liturgical resources, other theological texts and previous actions of General Convention to summarize the ways in which The Episcopal Church understands the work for social justice as essential mission and ministry of the Christian Church; and be it further

Resolved, That the Task Force study how The Episcopal Church currently fosters theological understanding and leadership for social justice, and recommend ways to foster theological and practical conversation across the Church on this topic; and be it further

Resolved, That the Task Force be directed to report its findings and recommendations to the 80th General Convention; and be it further.

Summary of Work

The Task Force met monthly via Zoom between January 2019 and January 2021. After reviewing its mandate and setting norms, the group agreed that each member would share what informs their theology of social justice advocacy. Told from our different and mutually enriching perspectives, these precious stories revealed equally different and enriching understandings of the theology of social justice. Through this journey of sacred stories, which included references to Scripture, theological concepts, and ongoing reflection on world events, it became clear to the Task Force that The Episcopal Church has much work to do in re-examining our theology of social justice advocacy.

The work is urgent.

The suffering produced by injustice is with us now and does not wait for us to perfect our concepts and amend our tenets. As we were in the process of sharing our stories, our deliberations were interrupted by a global pandemic that disrupted our lives in ways not seen for a century. The disease most heavily affected those already harmed by systemic inequality, the most vulnerable in our society. We were interrupted again when the world experienced the visceral impact of watching, on small screens and large, the death of George Floyd. People felt the call to action and the Church was called with them.

These tragedies, lives lost to disease and lives lost to violence, were produced or exacerbated by government policy and by public behavior. The state, by what it does and what it leaves undone, demonstrates the power of its influence on people's lives. The collective action of people, as they comply or refuse to comply with exhortations of public actors, demonstrate the power of citizens in a free society. There is no neutral position in this world. To be silent is to be complicit. The Church cannot avoid a choice. And the Church cannot avoid examining every aspect of its life, whether theology, liturgy or governance, in how it either perpetuates or eases the burdens of inequality. The work is urgent.

We see the work, in fact the call to social justice, as a continuum, manifesting in direct service, financial support, advocacy for systemic change and reforming our own structures. Each form is important as, collectively and organically, we seek to be the Body of Christ, and all of God's people are important in building, mending, and strengthening relationships and changing systems.

Context:

Our individual contexts (including, but not limited to, geography, socio-economic status, race, ethnicity, nationality, age, ability/disability, gender, sexual orientation) create the lenses of perception through which we see the world as Christian individuals and as Christian community.

Our shared Episcopal identity affects every aspect of the Task Force's work, and one of our primary concerns is to place our work in the context of who we are as The Episcopal Church: we are a primarily white church that has benefitted from systems created by white men of wealth and privilege. While our church includes multi-racial and multi-ethnic siblings from countries outside the United States, ninety percent of U.S. Episcopalians are white.⁽¹⁾ In addition, the Episcopal Church actively retains 18th century institutional structures of governance, hierarchical authority, and rules-based procedure built by and for a dominant culture of patriarchy, classism, white supremacy, imperialism, and colonization.

Some implications of this were eloquently described by The Rev. Gay Clark Jennings, President of the House of Deputies:⁽²⁾

Too often, we are too proud that eleven presidents have been Episcopalians, that presidents and members of Congress and Supreme Court justices worship at our churches, and that we bury them with pomp and circumstance when they die. We are proud that, in Episcopal pews across the country, you can find civic leaders and business tycoons and media superstars. We still like our access to power and wealth.

Now, there are many places in the church where the great wealth to which we have access is being used for great good. And we are justifiably proud that our history also includes prophets like Absalom Jones, Pauli Murray, Thurgood Marshall, and the martyr Jonathan Daniels. But in recent years, our identity as the church of the establishment has sometimes hindered our collective willingness to speak the truth about racist, xenophobic, anti-democratic policies and actions and the brutal policing and enforcement actions and practices that undergird them. Like the Anglicans who worshipped at Cape Coast Castle, we have helped normalize oppression and racism and the people who enforce it, because we have been too comfortable with our relationship to temporal power.

Other themes pertaining to white supremacy and the dominant culture emerged in our reflections, including:

- Western Christianity has evolved in a symbiotic relationship with the engines of capitalism, where a concern to manage and protect financial assets are often valued over care and protection of people and creation.
- Our socially constructed narrative is one of individualism.
- Various cultures see and hear the Gospel differently. For example, it is embraced by Dalits of India (and other people who are oppressed) as a liberating text. Is that so among people of greater privilege?
- We need to reckon with the Episcopal Church's past for having colluded, consistently and often subliminally, with the Empire. Such a reckoning calls us to humbly name and lament the ways we have sustained systems of privilege and superiority, misusing Scripture for tacit approval.
- We need to acknowledge and lament the Church's role, sometimes active and sometimes as bystander, in the construction and perpetuation of economic and social systems that coerced Native Americans, African Americans, Asian Americans, Latin Americans, and other groups into less than human and subaltern status.
- We have difficulty recognizing and critiquing systems of domination both inside the Church and in the world. We refer people to the secular government to handle many difficult issues and often—consciously or unconsciously—remain unaware of the impact our lack of attention has on the most vulnerable. This includes systems that are deeply embedded, providing uneven and unequal access to material building blocks for a dignified life, such as access to appropriate health care, a good education, and family-wage jobs, which cannot be resolved by charitable donations, however important those can be in meeting immediate needs. Although many of our congregations are involved in much-needed programs of service and charity, we do not as often look “upstream” to understand what is the source of the ongoing problems that our programs are trying to address.

Given these contexts, we cannot avoid the observation that the lens through which many look at social justice is distorted.

While this report is not specifically a study about race or racial disparity, one constant theme in our work has been the centrality of race and racial disparity in addressing social justice advocacy.

How do we acquire the lens of Christ as we look at social justice?

Acknowledgement of History:

We can start by looking to prophets and laborers in our own tradition who have come before us. From Absalom Jones, first African American priest of our church, who preached mighty sermons and who published and petitioned against slavery, to Edward Willis Rodman, theologian, teacher, and pastor who helped to found the Student Nonviolent Coordinating Committee and who led the Episcopal Urban Caucus to push the Episcopal Church to focus on the intertwining of poverty and racism. We are rightly proud of the historic contributions of laypersons in public service, notably Francis Perkins, Secretary of Labor and architect of the New Deal; and Thurgood Marshall, civil rights attorney and first African American Supreme Court justice, both faithful Episcopalians who cited their faith as the basis for their work for justice in the political sphere.

We acknowledge the labor of pastors, preachers, and deacons, who have shepherded communities through times of terrible trauma: first Native American priest Enmegahbowh and deacon David Pendleton Oakerhater during the violent U.S. westward expansion into Indigenous lands in the 19th Century. We remember lay missionary and railroad worker Ah Foo, who helped start the first Asian Episcopal Church, in Carson City, Nevada. We look to the first Asian American churches in San Francisco, Los Angeles, and Honolulu, who supported their communities through the traumas of the Chinese Exclusion Act and Roosevelt’s Executive Order 9066 leading to the internment of Japanese Americans. In an Episcopal Cafe series on the Asian American Episcopal Church, Bishop Allen Shin, Suffragan of New York, reflected that

Many of the Asians stayed in the church, despite the challenges and racial discrimination that they experienced. In fact, similarly to African Americans, Christianity was actually their outlet. Church was their community center. Church was the center of their communal life. Church had an important role in bridging and bonding the community together.⁽³⁾

The Blue Book report of the Committee on the State of the Church in 2018 describes a perception of the Church’s officially sponsored “outreach to people of color in traditional missionary terms of ministry to those people: bringing the Gospel of Jesus Christ to these communities and building agencies and institutions to provide for health care, education and social welfare”⁽⁴⁾

We look to the local initiatives of congregations and dioceses that have been anchors for their communities in the midst of upheaval and change—to name just a few examples: Church of the Epiphany / La Iglesia de la Epifania in Los Angeles, which became a center for the Chicano Movement in the 1960s;⁽⁵⁾

The historic work of church members and organizations in advocating for racial justice, from the abolition movement through Reconstruction and then Jim Crow to the Civil Rights Movement and up to today remains an important touchstone for our work today, from the early work of the Conference of Church Workers Among the Colored People (CCWACP), founded in 1883, and its successor organization the Union of Black Clergy and Laity (1968), later called the Union of Black Episcopalians (UBE). Their work was supported by groups such as the Episcopal Society for Cultural and Racial Unity (ESCRU), founded in 1959. Some of this work was focused on participation in the wider movement events of the day, such as the various marches in Selma in 1965 and voting rights campaigns, and some of the work was focused internally on our own Church's segregated institutions, from congregations to hospitals to seminaries in both South and North.

At the time, the Church's engagement with the Civil Rights Movement was often portrayed as controversial, divisive, and partisan, just as we hear today about church participation in Black Lives Matter protests. Yet the considerations of the participants at the time were explicitly linked to their Christian faith, especially in the mystery of the incarnation of Jesus, and our baptism, communion, and resurrection in Christ. Or as church seminarian and Civil Rights martyr Jonathan Daniels wrote: "I began to know in my bones and sinews that I had been truly baptized into the Lord's death and resurrection...with them, the black men and white men, with all life, in him whose Name is above all names that the races and nations shout...we are indelibly and unspeakably one."⁽⁶⁾

The Episcopal Church has also had times of engagement and investment in economic justice, notably in funding invested in the General Convention Special Program and its Joint Urban Program from 1967 to 1983, and then in the Jubilee Ministry program begun in 1982 to start Jubilee Centers at diocesan and local levels and provide resources for training, networking, and action in a diverse set of urban and rural communities. The Jubilee resolution was undergirded by a theological and Biblical reflection offered by the Standing Commission on the Church in Metropolitan Areas in their 1982 Blue Book report:

We believe that in the Church's doctrine of the Incarnation we come face to face with our mission. Christ dwells among the least of our brothers and sisters; ... Certainly we are called to minister to the immediate suffering which afflicts the victims of society whom we see all around us; distribution of food, medical care, shelter, and other immediate and primary needs. But we also know that such ministries are not enough, because they do not address the injustice which causes the pain in the first place. The People of God share a mission to change whatever causes the oppression.

From the 1970s into the 21st century, the advocacy work of a shifting group of organizations, including the National Industrial Mission, Episcopal Urban Caucus, the Union of Black Episcopalians,

the Episcopal Network for Economic Justice, the Episcopal Peace Fellowship, Episcopal Women's Caucus, Episcopal Asiamerica Ministries, Integrity / Episcopal Rainbow, Claiming the Blessing, and TransEpiscopal, has been a key force in pushing the Church to engage in public advocacy. The newsletter "Issues" was begun in the living room of Episcopal theologian William Stringfellow to call the Church to its witness in the name of Christ; *Issues* is now the newsletter of The Consultation, a collaboration of social justice organizations in the Church.

In the push for women's ordination led by a number of organizations and leaders including the Episcopal Women's Caucus and the Philadelphia Eleven, and then, the push for sacramental access for gay, lesbian, bisexual, transgender and queer people—we acknowledge here the vision of our late brother Louie Crew, founder of Integrity—the Episcopal Church also began to take positions on public policy related to lesbian and gay, and eventually, starting in 2009, transgender civil rights: relying on those resolutions, our church leaders have been in forefront among faith communities in advocating for LGBTQ civil rights; notably, our church's presiding officers were the lead signers on a 2019 amicus brief to the Supreme Court related to workplace discrimination against LGBT workers, *Bostock v. Clayton County, Georgia*; ⁽⁷⁾ as well, state representative Byron Rushing, also a senior deputy to General Convention, was a lead sponsor in 2011 of the Transgender Equal Rights Bill in Massachusetts.

In recent years, environmental and climate justice has been another major theme of church policy work. The work of Gwich'in Episcopalian communities in Alaska and of the Standing Rock Episcopal Mission in South Dakota have called the Church to respond to the effects of fossil fuels on humanity and the Earth. As well, the Church has focused on supporting immigrants and refugees, and has carried that work into advocacy on refugee and immigration policy. While the impetus for the work has come from immigrant congregations and solidarity work in affected communities, it has been taken up by the Episcopal Church's Office of Government Relations and the Episcopal Public Policy Network, with significant staff time allocated for this work.

With the emergence of a new uprising for racial justice in the wake of police killings of Black folk from Ferguson to Staten Island to Louisville to Minneapolis (let us say their names: Michael Brown, Eric Garner, Breonna Taylor, George Floyd) and the terrible murders at Emmanuel AME Church in Charleston, the Episcopal Church has begun to stir again. Led by Presiding Bishop Curry and with Becoming Beloved Community, the Sacred Ground curriculum, the Absalom Jones Center, and local resources, local congregations are engaging in new ways, though unevenly, with a new reckoning of our church's involvement in and complicity with racism. Some key recent General Convention resolutions include our repudiation of the Doctrine of Discovery in 2009 [2009-D035]; the call to examine our historic ties and financial benefit derived from slavery in 2006 [2006-A123], later

extended in 2009; and the resolution calling for removal of the Confederate battle flag from churches, which was offered by the entire deputation of the Diocese of Mississippi in 2015 in response to the killings in Charleston [2015-D044].

A few major themes can be seen in this (brief and incomplete) survey: one is that the push for Episcopal Church involvement in social justice advocacy has always emerged from the communities most affected by injustice, and that those communities have understood our Christian faith and the love of Christ Jesus to be at the center of this advocacy. Indeed, while the Church-at-large has responded, the burden has often been on those communities to bring those issues to the attention of those who make policy, establish priorities, and allocate resources. We have wonderful examples and prophets, many of them now enshrined in Lesser Feasts and Fasts and its successor compilations. Yet our efforts have not always been sustained; we have started projects and then pulled back on funding and staffing them. Our triennial structure sometimes contributes to abrupt endings to work that is lifelong for both individuals and organizations.

It should be said that the Office of Government Relations and Episcopal Public Policy Network do admirable work in connecting General Convention resolutions to advocacy work for public policy in Washington, DC, and the Executive Council's Committee on Corporate Social Responsibility takes responsibility for making sure our Church's investment portfolio aligns with our stated values; but we are asking the Church not only to respond to the issues brought from under-represented groups, but to make those issues central to how we make decisions, including how we invest in formation and prayer for discipleship at the local level.

These historical themes were borne out in our second year of work, as we engaged our own contexts and as the world experienced major crises in 2020.

Emerging Themes:

Discord. Division. Brokenness. Need for reform. Resistance to reform. Frustration. Helplessness. Revelation. Possibility. Hope?

The themes that emerged from our stories and reflections, and their implicit theologies, were key in guiding the second year of the group's work. These themes were identified before the COVID-19 pandemic was upon us and became even more evident after George Floyd was killed in May 2020. That they emerged, not only in the initial work of knitting us together relationally, but even more clearly through the crises around us, has compelled us to share them as a framework for our recommendations.

While the Task Force felt the familiar inclination to ensure terms were commonly understood and defined, we found that some themes emerged, again and again in our stories and reflections on the twin pandemics of COVID-19 and racism, and what those pandemics reveal about our failed systems and structures.

Some themes fit more or less neatly into one of the categories of “social,” or “justice,” or “advocacy,” but eventually they all intersected. These themes provided a lens through which we re-examined the concepts of “social justice,” and “advocacy.” And the theme of “distortion” was consistent and undeniable.

Social Justice

The term “social” can refer to how society is organized, to companionship, or to an event at which people gather. It is about interaction with others and therefore always about relationships.

In the Christian vision, the term “justice” does not only pertain to the law, but has to do with what is morally right: equity, fairness, dignity, and right relationship.

Since the Episcopal Church has devoted time and resources to deepening and living into building out our understanding of The Rev. Dr. Martin Luther King, Jr.’s vision of “Becoming Beloved Community,” his view of justice is particularly relevant. Dr. King wrote to white church leaders in 1963 in his Letter from the Birmingham City Jail that “injustice anywhere is a threat to justice everywhere.” He taught that justice could not be parceled out to individuals or groups; it is the birthright of every human being.

If ‘objectivity’ is merely ‘collective subjectivity’⁽⁸⁾ then there is no such thing as ‘objective’ justice, only rules configured by, benefitting, and enforced by members of the dominant culture. Looking through the lens of Christ, the church is therefore called to resist the dominant culture and center ‘justice’ not definitionally on rules and enforcement, but experientially. The difference is between, on the one hand, experiencing fairness, protection, and restitution or, on the other, experiencing unfairness, bias, devastation, and—too often—death.

The call to justice, advocacy for justice, and persistent action for justice may be the most urgent call for the church, precisely because it existentially centers the voice, experience, and perspective of the vulnerable. Who among us can declare justice achieved except the oppressed and marginalized: the leper, the orphan, the widow; the Dalit, the BIPOC, the transgender person?

The church’s mission is to restore all people to unity with God and each other in Christ [BCP, Catechism, p. 855]. Therefore, in the Christian vision, social justice is the lived reality of right

relationship among and between each and all of us: something we long for in our hearts and strive for in our world because we see God in Christ in every person. This is explicit in our Baptismal Covenant: “Will you seek and serve Christ in all persons, loving your neighbor as yourself?” [BCP, Holy Baptism, p. 305].

This is the belief and covenant we assert, yet we tolerate and live with a profound distortion of this vision. A vivid example comes from one of our Task Force members, who wrote:

On this Pentecost, I saw this . . . at the end of a reflection: “If you would like to DO something to help dismantle systemic and institutional racism . . .” The reflection to that point was phenomenal for me as a brown person sitting in Episcopal pews over the years -- to finally hear words that recognize the oppression of people of color, suggesting that on the birthday of the church, transformation is what is being preached, called for. The plight of the oppressed was what was being centered. It gave me such hope.

And then, to see it [presented] as a choice (“If you would like to do something...”) for Christians who recite our baptismal covenant; [to hear it preached] that our profession of faith has optional components, that once again reflects a privilege to choose, which affords white Christians the option that Christians of color do not have. Striving for justice and peace is a matter of breathing for Black and Brown siblings, as past and present U.S. history has shown.⁽⁹⁾

Advocacy

Advocacy has been described as “a social change process affecting attitudes, social relationships and power relations, which strengthens civil society and opens up democratic spaces.”⁽¹⁰⁾ It consists of coordination, strategic thinking, information, communication, outreach and mobilization. It can be as simple as speaking up for another.

There can be a political aspect to advocacy, but there isn’t always. In fact, from the Latin “*advocare*” means ‘to call out for support.’ Like social justice, advocacy is a continuum: working to change public policy for the public good⁽¹¹⁾, advocacy can change public opinion and, likewise, affecting public opinion may lead to policy change.

Besides being extremely broadly defined, advocacy is surrounded by several persistent myths and misconceptions. Some the most common misconceptions include:

- Advocacy is only for professional lobbyists: In truth, advocacy is a public activity; while lobbying requires “behind-the-scenes” activities.

- Advocacy is walking down the street with a bullhorn or rioting in a demonstration or protest rally: In truth, rallies are activism, which can be useful as part of a larger strategy, but not always effective as advocacy in terms of sustained effort to change policy. Riots are violence.
- Advocacy is the same as fundraising or donating to charity: In truth, advocacy is about initiating social change, which cannot happen only by raising money. Social change is often achieved with little or almost no funds. At the same time, redirecting public and private resources can be an effective component of advocacy.
- Advocacy consumes a lot of time: In truth, advocacy doesn't have to be complicated or time-consuming – a properly planned and organized campaign requires small actions from many people rather than big ones from a few.
- Advocacy is all about “politics” (in a negative connotation): In truth, while advocacy can be political (i.e., lobbying for a specific piece of legislation), it is more often social and intellectual: focused on elevating, amplifying, and highlighting the voices and faces of affected people as well as speaking out on behalf of those without a voice or whose voice is suppressed or ignored.

(Thanks and credit to Anush Begloian for the framework and concepts in this section)⁽¹²⁾

Political

In turn, the word “political” is often confused with “partisan.” “Political” comes from the Greek (“*polis*,” meaning “affairs of the cities”), and does not equate with partisan. Politics means the set of activities for governing an area. Our church engages in politics when we bring our ethics and moral views into public conversations and deliberations about how our cities, towns, nations, and institutions are governed. We engage in politics when we ask: Who benefits from things as they are? Who is left out? How are the marginalized and most vulnerable affected by the action we are considering or the inaction we are tolerating that perpetuates things as they are?

Social Justice advocacy is core to the church's mission

The Task Force asserts that social justice advocacy is distinct from partisanship (though it may include supporting candidates or causes endorsed by a political party). Social justice advocacy is rooted in our moral tradition and our experience of Christ's death with us to sin and our hope of a risen life with him. Social justice advocacy is giving a public witness—through word and deed—to our biblical imperative to demonstrate our love for our neighbors.

Therefore, social justice advocacy is a central, not a peripheral or optional, manifestation of Christian discipleship.

Survey:

In the Fall of 2020, the Task Force sent a survey to bishops, deputies and other leaders of the church to gather stories and perspectives to inform our work. The survey was made available in English, Spanish, and French and was distributed with the help of the Episcopal communications office and the President of the House of Deputies.

Demographics

The survey received responses from 113 people. Reflecting the current racial makeup of the Church, a majority of respondents identified as White (82%) with minorities identifying as Black/African American (5%), Asian/Pacific Islander (2%), Hispanic/Latino (1%), Native American (1%). Ten percent of respondents chose not, or preferred not, to identify with the categories given. Women made up 66% of respondents, men 29%, while 9% chose not, or preferred not, to identify with the categories given. In terms of age groups, 16% of respondents were under the age of 50, with the majority of respondents 50 or older (50's 18%; 60's 23%, 70's 32%, 80's 10%; 90's 1%). In terms of sexual orientation, the majority identified as heterosexual (69%), 16% as homosexual, 2% as bisexual and 13% chose not, or preferred not, to identify with the categories given.

Overview

While the survey results should not be understood as comprehensive, the results offer themes for further exploration and a wide variety of perspectives on the theology of social justice advocacy in the Episcopal Church.

Many respondents claimed that social justice advocacy is at the core of the Gospel. Over and over, respondents cited scripture, tradition, prayer and liturgy—especially the Baptismal Covenant—as the foundation.

Everything about the Episcopal church and its finding the dignity in all people has informed my sense of call to work toward social justice. In living into my baptism, I find that it happens in both small and large ways, often through unplanned experiences and people met by chance or the grace of God. Each of us is called to be part of the beloved community of Christ, and without social justice, that really holds little meaning. Working toward what the church teaches and toward what Jesus calls the beloved community, requires work and above all love. That is what social justice is all about -- love and love in action.

Many respondents felt supported and encouraged in their discipleship and by the ministry of the church:

It is powerful beyond measure to exercise faith by praying with one's feet in the company of others who long for the Beloved Community to come on earth as it is in heaven. The trust that is built, the accountability that is fostered, the truth that is told, are immeasurably more real, necessary and sustaining, than what I have experienced [elsewhere].

Church resources that encourage social justice advocacy were named as support from clergy and bishops, groups of mutual support, Episcopal Public Policy Network (EPPN), Becoming the Beloved Community, Sacred Ground, ChurchNext curriculum, Community Organizing Principles and training, Asset Based Community Development Training and Episcopal Church participation in community organizing groups such as Faith in Action.

People of the church who responded to the survey described work in a variety of areas including prison ministry, police reform, immigrant detention, housing/homelessness, the death penalty, food insecurity, and public education. Activities encompassed charity, pastoral care, education and advocacy. Many did their ministry through ecumenical or interfaith organizations, or through secular ones.

Through a regional interfaith organizing group, I've had opportunities to work side by side with people different from me on, for example, getting local schools to commit to teach fuller and truer histories of race in our nation and region; helping to get local policing to better align with community values: supporting immigrants, including by accompanying them to ICE and immigrant court appointments; and developing a volunteer driver program to help get neighbors without cars to health-related activities.

When asked what or who shaped their understanding of the relationship between social justice advocacy and Christian vocation, mentors—including parents, teachers and clergy—were a frequent answer. Also cited were encounters with people from different countries or cultures. We believe one respondent captured the sentiments of many by responding “Jesus!” Some related that it was their lived experience of marginalization and injustice that formed their earliest thoughts on social justice and advocacy. Others mentioned formation programs such as Education for Ministry and other covenant groups played a part in shaping theologies of social justice advocacy. Participation in the Civil Rights and Black Lives Matter movements similarly helped make this connection.

Respondents found the theological basis for social justice advocacy in the theology of creation and the incarnation, *Imago Dei* and the command to love neighbor as self. One respondent wrote:

The entirety of our sacred texts are about one thing - God's love for us, and our responsibility to model that love with one another, including ourselves - to be good stewards of all of God's creation - the earth and all that dwells on it. You cannot claim to love God, and not be a voice for the voiceless.

Challenges

When asked what people found the most challenging in social justice advocacy in the church and what the church could do better, some cited the church itself as a challenge. Wrote one, “convincing other Episcopalians that being a nice, gathered community of good liberal people is not enough.” Another wrote, “I would have no church if I preached [social justice] from my pulpit. I often feel caught between a rock and a hard place... Bishop Curry and other bishops encourage making room for all people at the table. How do I make room for both voices?”

One respondent noted:

A good start would be providing training for rectors and key parish staff in the theological basis for social justice, and in teaching this to their congregations. Basic training also would be helpful in how to discern the needs of their communities and how to work with existing resources.

Others reported the church actively discouraged discussion or activities related to social justice. And others expressed disappointment by ways in which the Church does not uphold its own calls for social justice in its institutional life or pointed to the ways our view is distorted by our primarily Western, white, colonial vision.

I would like us to do more and think about the consequences within our own parishes less. [At one church I attended] we couldn't do anything that might tick off someone. As a result, it seemed everyone but a small percentage were ticked off.

And another, on the wider Church institutions:

The entire process of leadership formation and church governance needs ... evaluation. For example, General Convention promotes and perpetuates the existence of multiple institutionalized hurdles for people of color to participate in the processes of PB&F, creating and submitting resolutions, and to find room for their voice in every aspect of our governance. People of color are still thought of as being invited into white spaces - that needs to change in itself. It's our Church, too. If you really want to welcome us, let us in and let us change you.

Critiques & Cautions

Before sending out the survey, the task force consulted with several leaders in the Church to gain their feedback and comments. These leaders noted that for some faith communities the only theology is social justice theology. We were cautioned that some respondents might be confused or put off by the survey because it addresses “social justice theology as an add-on.” While not the intention of this survey, the task force is cognizant of this shortcoming and is aware that the survey is likely to contain or perpetuate unconscious biases of the majority of respondents (white, middle/upper-middle class, heterosexual) and that it may not capture the many theologies guiding communities of the church. We also acknowledge that the survey was long and time-consuming; we appreciate the richness of the responses from all who took the time to share their stories and reflections.

Next Steps

In this report, we have just begun to scratch the surface in mining the information in this survey. We recommend this survey be made available, including translations, to other communities, seminaries and research groups to further explore the rich experiences and perspectives captured in it. We believe it can provide important information for congregational life, formation and education as well as evangelism and mission strategy.

Beginning theological implications:

Within the Anglican tradition, our way of doing theology is not mainly driven by inherited doctrines from theological giants of the past. Instead, we pray our way into our theology through the paths of praxis or experience. Therefore, our methodology in doing theology is conducive to pursue social justice advocacy, and more, as long as we avoid colluding with the Empire. The words of John Keble, a country priest, “and help us, this and every day, to live more nearly as we pray” [The Hymnal 1982, #10] articulate simply our theological and ethical methodology as a people of common prayer.

One of the through lines in Scripture from Deuteronomy to Acts is the Jubilee Year, a call for our communal life to be rebalanced and shared so that all may partake in our common life. The church participates in God’s mission by seeking to reconcile the world with each other, creation, and God.

Social justice is about right relationships among and between all of us, centering the voice and experience of the marginalized (as we read in Matthew 25), and these are the relationships that have been, and continue to be, harmed by the systemic, unjust distribution of wealth, opportunity, and privilege.

Therefore, advocating and working for social justice is a core expression of the church's mission. As we said above, social justice includes acts of mercy or charity. It also includes dismantling institutions, structures, and policies that cause harm and divide us from each other; and it includes repairing the breach by rebuilding systems of justice, fairness, and equity (Isaiah 58).

While this observation may sound here like a conclusion, it's actually just the beginning. It gets us to the beginning of our journey, not the end; it repeats what many of us have known and others have resisted knowing. In any event, it fails to point us toward possible ways to make meaningful progress. What we need to talk about, explore, discover and practice within the wider church is how we will go about dismantling structures that perpetuate unequal power.

We also need to recognize the chasm between the Task Force's understanding of our Christian call to social justice and the private pietism that turns inward, aligning one's inner life with one's perception of God's will, perhaps in expectation of reward, and on leaning away from worldly engagement and machinations, such as advocacy, as being inappropriate, lacking virtue, or even, perhaps, "un-Christian."

By contrast, the Task Force feels called to lean into the world, and into the despair that injustice produces, to call out for change. We invite the church to do the same.

We are not underlining a common, and false, duality between action and contemplation. On the contrary, prayer should lead us to get close to our neighbors' suffering, and our neighbors' suffering should lead us to prayer.

End Notes

- (1) Pew Research Center's 2014 "Religious Landscape Study," <http://pewrsr.ch/1KtFGxx> , accessed October 13, 2020.
- (2) President of the House of Deputies Gay Clark Jennings, "How long, white Episcopalians, how long?," Executive Council opening remarks, June 8, 2020. <https://houseofdeputies.org/2020/06/08/how-long-white-episcopalians-how-long-executive-council-opening-remarks/> , accessed January 18, 2021.
- (3) As quoted in "Asian Americans in the Episcopal Church, Part 1," by Kelly Wilson, Episcopal Cafe, March 21, 2019. <https://www.episcopalcafe.com/asian-americans-in-the-episcopal-church-part-1/> , accessed January 14, 2021.

- (4) "Episcopal Church in Puerto Rico implements long-term recovery strategy after Maria," by Lynnette Wilson, Episcopal News Service, September 25, 2018.
- (5) Report of the House of Deputies Committee on the State of the Church to the 79th General Convention, p. 4. https://www.episcopalarchives.org/e-archives/gc_reports/reports/2018/bb_2018-R026.pdf , accessed January 14, 2021.
- (6) Jonathan Daniels, 1939-1965. The Church Awakens: African Americans and the Struggle for Justice. <https://episcopalarchives.org/church-awakens/exhibits/show/escru/jonathan-daniels> , accessed January 14, 2021.
- (7) Brief for amici curiae: The Presiding Bishop and President of the House of Deputies of the Episcopal Church; United Synagogue of Conservative Judaism; General Synod of the United Church of Christ; the Central Conference of American Rabbis; more than 700 individual faith leaders, et al. in support of employee litigants https://www.supremecourt.gov/DocketPDF/17/17-1618/107139/20190703161241692_38129.pdf [Moff br pdfa.pdf](https://www.supremecourt.gov/DocketPDF/17/17-1618/107139/20190703161241692_38129.pdf) [Moff br pdfa.pdf](https://www.supremecourt.gov/DocketPDF/17/17-1618/107139/20190703161241692_38129.pdf), as reported in the TransEpiscopal Blog, 6/15/2020: <http://www.transepiscopal.org/blog/in-the-struggle-together> , accessed January 18, 2021.
- (8) Molefi Kete Asante, attributed by Ama Mazama, according to Ibrim X. Kendi, How to Be an Antiracist, published by One World, 2019, p. 167.
- (9) Reuben Varghese, MD, MPH, and Task Force member, "A Pentecost Lamentation," response to homily preached on Pentecost, May 31, 2020, at St. John's Episcopal Church, Georgetown, in the Diocese of Washington; reprinted on the House of Deputies website at <https://houseofdeputies.org/2020/06/02/a-pentecost-lamentation/> , accessed January 18, 2021.
- (10) Handbook from Save the Children Fund, as quoted in the Culture and Creativity Programme of the European Union. <https://www.culturepartnership.eu/en/publishing/advocacy-course/what-is-advocacy> , accessed January 4, 2021.
- (11) Here, as elsewhere, we hold the very concept of 'public good' up to the light: who defines it? Who constitutes the 'public'? Who decides what is 'good'?
- (12) Anush Begloian, International Expert on Advocacy and Communications of European Union-Eastern Partnership "Culture and Creativity" Programme in Ukraine, Belarus and Moldova, 2016-2017, video lecture, "What Is Advocacy and How Can It Help?," <https://www.culturepartnership.eu/en/publishing/advocacy-course/what-is-advocacy> , accessed January 4, 2021.

Proposed resolutions

A078 Imagining a Church Grounded in Social Justice as Christian Ministry

Resolved, the House of _concurring, That the 80th General Convention affirm:

- 1) That social justice advocacy is a primary ministry of the Church; it is our corporate, public witness to the Mission of God “to restore all people to the unity of God and each other in Christ.” [BCP Catechism, page 855];
- 2) That social justice is about right relationships among and between all of us, centering the voice and experience of the marginalized (as we read in Matthew 25), and these are the relationships that have been, and continue to be, harmed by the systemic, unjust distribution of wealth, opportunity, and privilege;
- 3) That social justice ministry includes acts of mercy or charity but also must include dismantling institutions, structures, and policies that cause harm and divide us from each other; and it includes repairing the breach by rebuilding systems of justice, fairness, and equity (Isaiah 58);
- 4) Over this past triennium, (2018-2021) the global pandemic, racial justice uprisings, and escalation of the climate crisis including extreme wildfires and storms, as well as the societal fissures and institutional failures that these events have revealed, demand we understand this to be a revolutionary moment of accountability, repentance and renewed commitments to the mission of God. We are called to account for our failures to live the words we preach and pray. We acknowledge that historical practices, policies, and structures of the institutional church have played a role in the persistence of the systemic inequality and call out for out for immediate, urgent and enduring redress;

And be it further

Resolved, That all dioceses and congregations be called upon to offer, as a normative practice at any major or public gathering, an acknowledgement of the Native/Indigenous ancestors and peoples who have lived upon and loved the land on which we now live and work, from ancient times up to the present day; as well as, based on local history and context, the people of African descent who toiled in slavery and whose coerced, unpaid labor built our churches and contributed to our financial assets, as called for in General Convention resolutions 2006-A123 and 2009-A143; and be it further

Resolved, That all dioceses and congregations be called upon to ground every planning or business meeting or convention with prayers inviting an examination of conscience regarding the specific impact of the decisions of such meetings upon those who are poor, dispossessed, disadvantaged, or marginalized, and to provide and model forms for such examination of conscience; and be it further

Resolved, That all dioceses be called upon to offer, at least once a year, a diocesan-wide event or program and liturgy to engage our congregations and members in listening to and understanding the history and current context of our diverse local communities, with attention to those who have historically been dispossessed or disadvantaged; and be it further

Resolved, That this General Convention direct the creation of a Task Force on Imagining a Church Grounded in Social Justice as Christian Ministry be formed as a diverse group to include 2 bishops, 2 priests, 2 deacons, and 10 laypersons, in order to a) consider what the church must look like if we put our vocation to love our neighbor and to be repairers of the breach at the center of our work; b) to reach out to local and diocesan groups that are doing social justice and racial reconciliation work focused on systemic change, in order to understand what resources and gifts we already have in this work and where the gaps are; c) to liaise with the Standing Commission on Liturgy and Music and the Standing Commission on Governance, Structure, Constitution and Canons, the Presiding Officers' Advisory Group on Beloved Community Implementation (if it is extended in the next triennium), and other relevant interim bodies on consideration of these questions and how to address the institutional barriers to change in the church; and d) be charged with making recommendations to the 81st General Convention for institutional change to support social justice as Christian ministry in the areas of governance and structure, prayer and liturgy, catechesis and lifelong formation for discipleship, especially with laypeople and consistent with an equitable and inclusive polity; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$55,000 for the implementation of this resolution.

EXPLANATION

The 2021 Blue Book report of the Task Force on Theology of Social Justice Advocacy to the 80th General Convention provides the background for this resolution; please read the report in full. As we say in the report, this resolution is not a conclusion, but only a beginning.

\$55,000 is requested to fund this resolution:

One in-person meeting (\$27,200, estimated at \$1,700 x 16 members) of the Task Force on Imagining a Church Grounded in Social Justice as Christian Ministry;

Additional funds for task force members, in smaller teams, to carry out local site visits to congregations and dioceses doing exemplary work in training, formation, and implementation of social justice ministry; and to liaise with other interim bodies as described in the mandate (\$27,800 total: estimated at \$1,390 per meeting (assuming that the task force strive for efficiencies with local travel) x 2 members per team, x 10 meetings).

TASK FORCE ON WOMEN, TRUTH AND RECONCILIATION

Membership

Ms. Alexizendria Link, <i>Chair</i>	Western Massachusetts, I	2021
The Rt. Rev. Susan Goff, <i>Vice-Chair</i>	Virginia, III	2021
Mr. Neel Lane, <i>Secretary</i>	West Texas, VII	2021
Ms. Julia Ayala Harris	Oklahoma, VII	2021
The Rev. Laurie Brock	Lexington, IV	2021
Dr. Damaris De Jesus	Puerto Rico, IX	2021
The Rt. Rev. Ian Douglas	Connecticut, I	2021
The Very Rev. Dr. Kelly Brown Douglas	New York, II	2021
The Rt. Rev. Dr. DeDe Duncan-Probe	Central New York, II	2021
Ms. Robin Hammeal-Urban	Connecticut, I	2021
The Rt. Rev. Craig Loya	Minnesota, VI	2021
The Rt. Rev. Dr. Shannon MacVean-Brown	Vermont, I	2021
Mr. Alan Murray	Oregon, VIII	2021
The Rev. Kurt Wiesner	Utah, VIII	2021
The Rev. Deacon Carolyn Woodall	San Joaquin, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Mandate

2018-D016 Seeking Truth, Reconciliation and Restoration

Resolved, That the 79th General Convention as members of the Body of Christ, confess our sins of gender-based discrimination, harassment, and violence against women and girls in all their forms as we understand these sins, which include, but are not limited to, sexual and gender harassment, sexual assault, physically, spiritually, and emotionally abusive behavior, and oppression based on gender, particularly as these sins have denigrated and devalued women and their ministries; acknowledge that within our patriarchal culture, the misuse of power and authority is primarily exercised by men with the vast majority of victims being women; acknowledge that we have created a culture of excuses, justifications, enabling, and dishonesty around gender-based discrimination and violence; have not heard the experiences of women with the goal of justice through acts of contrition, restoration, and reconciliation; declare that we as the Church seek to turn from the systems of oppression, patriarchy, ableism, heteronormativity, white supremacy, and our colonial legacy, among others, and seek to engage in restoration of the dignity of women and reconciliation

from past acts, beginning with confessing to God and to one another the truth that we have not loved God with our whole heart, and mind, and strength, and that we have not loved, respected, and honored the presence, gifts, equality, and ministry of women, seeing in them the presence of Christ; confess that we have embraced patriarchal power, and in doing so, have exploited women and been blind to injustice and prejudice; and declare that we seek to repent and be restored to God and to each other, with the Church and each diocese declaring a period of fasting and repentance for this sin; and be it further,

Resolved, That the 79th General Convention authorize the establishment of a Task Force for Women, Truth, and Reconciliation for the purpose of helping the Church engage in truth-telling, confession, and reconciliation regarding gender-based discrimination, harassment, and violence against women and girls in all their forms by those in power in the Church, making an accounting of things done and left undone in thought, word, and deed, intending amendment of life, and seeking counsel, direction, and absolution as we are restored in love, grace, and trust with each other through Christ; and be it further,

Resolved, That this Task Force be appointed jointly by the President of the House of Deputies and the Presiding Bishop, with 15 members - 6 lay people (at least 4 of whom identify as women), 6 priests or deacons members (at least 4 of whom identify as women), and 3 bishops members (at least 2 of whom identify as women). The overall composition of this task force shall include members of the LGBTQ community, people of color, and reflect regional diversity. The overall composition of this task force shall include at least 5 members who have experienced gender-based discrimination, harassment, and violence against women and girls and at least 3 members who have personal and recent (within the last 5 years) experience working with complaints within the general Church and/or secular community on matters of gender-based discrimination, harassment, and violence against women and girls. This Task Force shall report its progress to Executive Council, present a public timeline, summary of ongoing work easily accessible by members of the Episcopal Church, and report back to the 80th General Convention on the following tasks:

-To develop a survey on gender-based discrimination, harassment, and violence against women and girls in all their forms as we understand these sins, which include, but are not limited to, sexual and gender harassment, sexual assault, physical, spiritual, and emotionally abusive behavior, and oppression based on gender. This survey shall be modeled on the survey used to gather information and compile the 2017 report "Sexual Misconduct in the United Methodist Church: US Update," and the task force shall create said survey no later than December of 2019 and shall work with appropriate general Church organizations, dioceses, and church leadership, both lay and clergy, to distribute widely in the Episcopal Church for access by both laity and clergy no later than spring of 2020, said survey being available primarily on-line, and with adaptations made as determined by the task force to enable responses by those members of the general Church who may not have ready and easy access to the internet;

-To conduct a review of survey responses and data regarding gender-based discrimination, harassment, and violent behavior that has been experienced by those who identify as women in our church; and present this information in accessible, public, and informative ways as a truthful reality of the treatment of women; and the impact of this treatment on lay and ordained women and girls, their ministries, and the ministry of the Church to the following members and organizations of the Protestant Episcopal Church in the United States of America: The House of Bishops, The Executive Council, The National Association of Episcopal Schools; all Episcopal Seminaries (including diocesan formation programs for ordination); Episcopal Camps and Conference Centers; Diocesan Youth Directors; all Canons to the Ordinary; all Transition Officers; all diocesan Chancellors; and any other bodies, organizations, or committees that the President of the House of Deputies or the Presiding Bishop deem necessary;

-To coordinate and receive reports from the aforementioned persons and organizations no later than six months after the publication of the survey response report with the following written responses to the report, a copy of the same responses shared with the Presiding Bishop and the President of the House of Deputies: How their body and/or institution has contributed to a church culture of gender-based discrimination, harassment, and violence against women and girls in all their forms, when appropriate detailing specific examples of this culture that has approved of this behavior, ignored and/or excused this behavior, and how this culture has damaged the body and/or institution; The body and/or institution's plan of action within their body or institution that can bring about a culture of truth telling, repentance, reconciliation, and justice in our church; including a timeline of said plan of action; and any other questions the task force, in consultation with the Presiding Bishop and the President of the House of Deputies, deem helpful and necessary for the general Church to confess the truth of the impact of the sin of gender-based discrimination, harassment, and violence against women and girls in all their forms and to engage the process of restoration and reconciliation;

-To create a Truth and Reconciliation process to guide churches, dioceses, provinces, and the general Church as they develop their own paths for reconciliation and restoration, with emphasis given to discerning the *qualities* of methods churches, dioceses, provinces, and the general Church may implement to witness the truth and to seek justice, restoration, and reconciliation; recognizing a one-size-fits-all process will not be helpful given the diversity of our Church, and that identifying qualities for a process invites churches, dioceses, provinces, and general Church to map their ways forward to justice, restoration, and reconciliation with guidance;

-To conduct a comprehensive audit and analysis of the internal church-wide structures that exist, or are needed, to educate and inform the church about realities and consequences of gender-based discrimination, harassment, and violence against women and girls in all their forms; to develop programs to proactively reduce incidences of gender-based discrimination, harassment, and violence within the church; as well as to develop resources that build the capacity of our church to provide trauma informed pastoral care for victims;

-To oversee an audit done by an outside auditor of the culture within church-wide structures to identify systemic expressions of power and leadership that create and continue gender-based discrimination, harassment, and violence against women and girls in all their forms, particularly the impact of this system as it manifests in access to leadership, pay inequity, imbalances in power, inequality in leadership, gender-based discrimination, sexual harassment and violence, and the enabling of gender-based violence by those in positions of power throughout the church that diminishes, excuses, and discounts discrimination, abuse, and harassment, contrary to the Gospel of Christ;

Resolved, That the General Convention request that the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of \$320,000 for the implementation of this resolution which will provide funding for regular meetings, including bi-annual in-person meetings throughout the triennium (\$150,000); costs associated with creating and distributing the survey and subsequent reports (\$40,000) contract with external firm to conduct a culture audit (\$65,000); website, communications, and staff support (\$50,000); and expenses associated with in-person presentations of findings to strategic groups, including Executive Council, the House of Bishops, and other groups as determined by the Task Force, the Presiding Bishop and the President of the House of Deputies (\$15,000).

Summary of Work

I. Meetings and Scope of Work

The Task Force gathered initially in-person for two days in November 2018 in Linthicum Heights, Maryland as part of a wider church-wide gathering of committees, commission, agencies and task forces. During the in-person meeting, the Task Force had a detailed discussion on the creation of the Task Force, including the concerns that led to Resolution 2018-Do16 of the 79th General Convention. Following the Liturgy of Listening service developed by Bishop DeDe Duncan-Probe and members of the House of Bishops and offered to the members of the church, the reality of gender-based discrimination, harassment, and violence in our culture and in our church could no longer be ignored or excused as outlier behavior. The service featured stories from women and men who were victims of sexual misconduct perpetrated by someone in the church. However, simply revealing the reality of these gender-based sins of the church is not where we as Christians can rest. We are called to make a fearless and honest accounting of our sins, and then to do the work of reconciliation. This work includes taking responsibility for a long history of gender-based discrimination, harassment, and violence; reflecting on how gender-based discrimination, harassment, and violence has become so deeply entrenched in the culture of the church; and repairing the damage that has been done. A significant strand of conversation regarding repairing the damage led our group to consider what a just outcome would look like to those who have experienced inequality, harassment, and other forms of oppression based on gender (particularly those who identify as women).

We coordinated with the Office of General Convention to schedule future meetings. These meetings occurred on the following dates in 2019: January 18th and 31st, September 10th, November 19th, and December 19th. All 2020 meetings were held online via Zoom in January, March, April, October and December (January 18, March 6, April 2, April 22-23, October 1-3 and December 17). Members of the Task Force with particular insight and expertise in specific areas were in contact regularly, particularly during the creation and distribution of the survey. We also regularly used the General Convention Message Board / Extranet to update members of actions taken, additional insights gained, and other relevant information regarding the work assigned to us.

Given the enormous tasks mandated to this Task Force by The General Convention, and after an honest assessment of what could reasonably be accomplished well in the triennium, the Task Force further focused our work by creating 3 subcommittees - a subcommittee to prepare, distribute and review the survey; a subcommittee to examine, implement, and oversee a systemic audit of gender-based violence and discrimination; and a subcommittee to create a process for truth and reconciliation.

We realized much of the work of the subcommittees for the audit and the truth and reconciliation process would be dependent upon the results of the survey and the responses from various Church leaders and institutions regarding the survey results. All subcommittees, however, did move forward with their assigned areas.

The subcommittee for the audit worked to define the terms justice, truth, reconciliation, and abuse of power so that as a church, we can begin with a common language of key terms in order to enable common conversation. Further, the terms as defined by this subcommittee and the Task Force will be incorporated into the results of the survey when they are shared with the church. The survey subcommittee identified and worked with a consultant prior to and during the survey process to develop, distribute, and examine the results of the survey. More about this process is in the survey section of this report. The subcommittee for the process of truth and reconciliation began to explore various ways these processes have been used at institutional levels and the methods, practices, approaches, and resources that are available as we as a church move forward. We also discussed the various models of truth and reconciliation that have been used within The Episcopal Church, particularly by various dioceses, regarding gender discrimination, harassment, and violence.

The Task Force reviewed and discussed in detail the Report on Sexual Misconduct used in the United Methodist Church. After discussion of various options, the Task Force decided to conduct a similar survey, engaging the professional researcher who developed and compiled the results of the United Methodist Church survey. Among the areas of concern the Task Force highlighted were: ensuring the survey results were as anonymous as possible; asking questions that addressed the many ways gender-based discrimination, violence, and harassment are inflicted upon victims; and making sure the survey was available to as many people as possible who wanted to share their experiences, including those who may no longer be active members of The Episcopal Church because of their experience with gender-based discrimination, harassment, and abuse.

The Task Force recognized that the mandates of D-016 may also be appropriately addressed by other interim bodies during this triennium. Members agreed that those mandates that were more correctly suited to the mandates of other interim bodies would be referred to those bodies to avoid duplication of tasks and to use the time and creativity of all interim bodies efficiently. Our Task Force unanimously agreed that the scope of work would be to focus on creating, distributing, and reviewing the results from the comprehensive survey and developing guidelines for the survey results to be distributed to appropriate church bodies as we establish a process for a Systematic Review/Audit and Truth and Reconciliation Process.

The Task Force discussed their progress and concerns with the presiding officers in a virtual Task Force meeting in April 2020. Additionally, during the two-day April meeting, the Task Force met with other interim bodies including the Task Force to Study Sexism and Develop Anti-Sexism Training, and the Task Force on Theology and Social Justice Advocacy to share resources and determine which task force may be best suited for mandates from General Convention regarding 2018-D016. Members of the Task Force also met with the Reverend Lester V. Mackenzie who shared his experience, thoughts, and guidance in both national and local truth and reconciliation practices. Father Mackenzie brought his insights from when he lived in South Africa during apartheid and the healing process of truth and reconciliation after apartheid.

II. Survey

A. Creation of the Survey

In Resolution D016, the 79th General Convention of The Episcopal Church resolved to take concrete steps toward addressing “the sins of gender-based discrimination, harassment, and violence against women and girls in all forms.” Part of the resolution mandated a study of the experiences from the past, so the church and its members had concrete evidence of the scope and impact of gender-based discrimination, harassment, and violence on those who are victims, those who are victimizers, and the church as a whole. As stated earlier in this report, the Task Force unanimously agreed that this survey was the important first step for the work of truth. We admitted we could not know how to address this insidious sin in our church without knowing the scope of it in our church.

In consultation with the Task Force, the survey was created by The Rev. Dr. Gail Murphy-Geiss, Ph.D. an ordained minister in The United Methodist Church and a Professor of Sociology at Colorado College in Colorado Springs, Colorado. Dr. Murphy-Geiss assisted the United Methodist Church when they sought to obtain insights regarding their church’s experience with gender-based discrimination through a quantitative survey. Dr. Murphy-Geiss consulted with members of the Task Force as to the scope of the survey for The Episcopal Church. Dr. Murphy-Geiss created the survey using Qualtrics software. The survey was created; in both English and Spanish, and distributed electronically in the Winter of 2020 through The Episcopal Church Communications Department and Directors of Communication in various dioceses. The survey was offered in an electronic format and a printed

format for those who may not have access to the internet. The initial time for the survey to remain open was extended to respond to the impact of Coronavirus. The survey remained open through the Spring and into the Summer of 2020.

Of note is that the Task Force expressed concern that asking people who recall and share, even anonymously, an event or events of harassment, discrimination, and violence may be traumatic for those who are completing the survey. The Task Force planned to offer lay and ordained Episcopal chaplains, contracted specifically for this purpose, as one resource. After lengthy conversations with leadership of The Episcopal Church and the Office of the General Convention, it was decided during the April 2020 meeting of the Task Force that this plan was not feasible if the survey was to be distributed by mid-2020.

Another factor as we developed the survey was the very real duty of clergy to report in accordance with Title IV (the clergy discipline canon) of the Constitution and Canons of the Episcopal Church. The mandate of 2018-Do16 involves, by necessity, hearing the stories of victims of gender discrimination, abuse, harassment, and misconduct: all of which would require a mandatory reporting per Title IV. After repeated consultations with the Chancellors for the Presiding Bishop and the President of the House of Deputies, we were able to develop survey questions and a summation process of survey responses that alleviated most concerns from the Chancellors.

B. Survey Results

Results and data for our survey entitled *Gender-Based and Sexual Misconduct in The Episcopal Church* are detailed in a 29-page report with tables at the end of this report. The data categories included tables for 1) Demographics, 2) Knowledge and Awareness, 3) Experiences of Misconduct, 4) Responses to Misconduct, 5) Impact of Responses to Misconduct, 6) Impact of Misconduct on Lives, and 7) Witnessing Misconduct of Others. The last survey question allowed respondents to add anything else important to them including personal stories.

After an initial review of the report, members from the Task Force met with the consultant for an in-depth analysis and clarification of data results. This meeting was recorded and made available to members of the Task Force who could not attend the meeting, as the discussion was deemed vital to our next phase of work.

III. Processing Initial Information from the Survey

A. Consultation Regarding the Results of the Survey

The pandemic has created complexities in obtaining and reporting information, a reality not unexpected by our Task Force. However, one of the mandates of 2018-Do16 is to share the information gathered in this survey with church leadership and agencies. To that end, the Task Force

has made arrangements to present the survey report in April 2021 to the Mission Within the Church committee of the Executive Council for their reflection and responses.

Although General Convention is rescheduled to 2022 due to the effects of the Coronavirus pandemic, the Task Force plans to work diligently to present results of the survey to other interim bodies for their insight and work including the Task Force to Study Sexism and Develop Anti-Sexism Training, and the Task Force on Theology and Social Justice Advocacy.

We would like to see the results of the survey shared with all dioceses, schools, camps and conference centers, and other agencies and organizations affiliated with The Episcopal Church, including the House of Bishops. Given the final report was completed in December 2020, the planning to present survey results is continuing to unfold as we consult with various church leaders.

B. Immediate Areas of Focus

While gathering factual information regarding gender-based harassment, abuse, and violence is an important initial step as we face the history and legacy of this sin in the church, this information must lead to serious reflection about why this behavior has been permitted and even encouraged, its long-lasting damage to the body of the Church and its members, and steps that church leadership and its agencies can take to repair and restore the damage caused by gender-based harassment, abuse, and violence and ensure a new way forward in reconciliation.

Based on the survey results, the Task Force identified 3 main areas ripe for the work of repair, restoration, and reconciliation. They are 1) developing a useful, helpful, and safe process for reporting and investigating abuse, 2) developing more churchwide training that includes clergy and laity; and 3) updating materials to reflect a new-found awareness of gender-based violence, including working to develop common understandings of what constitutes gender-based harassment, discrimination, misconduct, and violence as well as to end the quiet toleration of said behaviors within the church, particularly among the cis male demographic.

1. Developing a useful, helpful, and safe process for reporting and investigating abuse

Current procedures for reporting and investigating gender-based harassment, misconduct, and abuse are limited to clergy misconduct guided by Title IV of the Constitution and Canons of the Episcopal Church. State and federal criminal and civil avenues may be available, as well. However, there has long been concern that the existing procedures do not allow any review or investigation of gender-based misconduct perpetrated by laity, as well as a long history of clergy misconduct being excused or ignored, while the victim is often the focus of retaliation. Clergy and employees particularly expressed fear that any report would be held against them, resulting in retaliation by the perpetrator, dismissal from the ordination process, removal from a church position, or being labeled as “problem clergy” by bishops and others in authority. The survey suggests that our current procedures are both lacking in protections, both short and long term, for victims and are still associated with practices of the past, where gender-based misconduct is ignored or excused or, in

some cases, encouraged, while those victimized are discredited. Serious examination of the current misconduct process for clergy and laity for reporting gender-based harassment, misconduct, and violence is needed.

While procedures for reporting and investigating misconduct are needed, as important is the awareness that prevents a situation of gender-based harassment, misconduct, or abuse from happening in the first place. This awareness comes, in part, from training of both clergy and laity on what constitutes gender-based harassment, misconduct, and abuse, and the awareness of church policy and procedures regarding this area. In particular, the data found that most perpetrators are cisgender laymen. Therefore, the absences of guidance and awareness for the laity is important, and cisgender laymen should be of particular focus.

At the same time, support structures should be developed for the most common victims and survivors of this harassment, misconduct, and abuse - clergywomen and transgender/nonbinary clergy. Those who have been victimized need to be made aware of avenues or restitution and justice available to them.

2. Developing more church-wide training that includes clergy and laity

Although past training has received positive reviews overall, the awareness of what constitutes gender-based harassment, misconduct, and violence is changing. Comments that were seen as “cute” 25 years ago to the new young female priest regarding her appearance or her body are now recognized for what they are—gender-based misconduct. Training should pay particular attention to gender-based micro-aggressions, which are often subtle but are still damaging. One reality is that men and women, particularly of certain demographics, do not have a common language of what we mean by gender-based harassment, misconduct, and violence. Widespread training would begin to help with a common language and a church-wide understanding of behaviors that constitute harassment and violence.

Focus should also not only be on discrimination to cisgender women, but also to transgender and nonbinary persons, who are very likely to experience abuse in the church while having said misconduct ignored, excused, or encouraged.

A challenge with any training is to ensure that training and formation programs are widely attended. Mandatory attendance is certainly easier for clergy and lay employees. Our survey noted that most perpetrators are laypersons, work colleagues and fellow students, which makes required participation more challenging. One counter is that the training includes a section on tactics used to respond when a person witnesses an incident. This may help begin to create a culture where gender-based harassment, misconduct, and abuse is not only unacceptable in policy; it is also unacceptable from colleagues and fellow members of one’s congregation.

Another focus is not only to limit the training to typical power differentials that bishops, rectors, supervisors, and professors are the typical offenders (although a focus on these power differentials

is certainly needed), but also to explore the more common dynamics around the harassment of service providers and peers.

3. Updating materials to reflect a new-found awareness of gender-based violence

The demographic realities of The Episcopal Church present challenges for any substantial shift in culture around gender-based harassment, misconduct, and abuse. Most notable of these demographics is one of age and gender. The average member of The Episcopal Church is older than the average citizen of the United States. As social changes bring past norms and behaviors into new light, and groups who were previously admonished to stay silent speak out, those who benefited from and enjoyed the freedom to belittle and abuse women, to use female traits as insults, who have enjoyed the financial benefits of the wage disparity, and the many other ways gender-based sins have been legitimized by our culture, may be resistant to changes and new awareness. Certain groups may want to dismiss any attempts at restoring and repairing the damage, and they may sabotage our collective work to create a culture in the church that respects and values all genders, ensures safety, and protects the dignity of all genders.

C. Create a Truth and Reconciliation Process

Alongside the tasks that have been listed in the previous section, the Task Force takes seriously the process of telling the truth as necessary for reconciliation in our church. We continue this work by further examining survey results to understand more fully the scale and impact of past injustice within the church prior to starting the process. Foundational to the truth and reconciliation process are personal stories. The personal stories obtained through the survey that remain confidential may prove to be a valuable resource. We are also exploring a way for other personal stories to be told, as well as a path for those who have been perpetrators and enablers to hear the impact of their actions and/or inaction and offer their repentance. This truth and reconciliation process is just beginning with regard to gender-based violence.

IV. Actions to other bodies

The Task Force members agreed that the expansive mandate of Resolution 2018-D016 is beyond the capacity and budget of one Task Force to accomplish in time to report to the 80th General Convention. We have consulted with other interim bodies and standing commissions as we determine which ones may be best equipped to address particular sections of the Resolution. One area of particular concern was the mandate to “oversee an audit done by an outside auditor of the culture within church-wide structures” for the purposes described in the sixth point under the third resolve of Resolution 2018-D016.

The hope for such an audit is to discover those adaptive challenges that face the church regarding gender-based harassment, discrimination, misconduct, and abuse. A reality is that gender-based abuse and misconduct has worked for men in the church for centuries, and simply creating training modules and a more responsive misconduct procedure cannot unearth the long-entrenched beliefs, attitudes, and fears that lead to gender discrimination and abuse. These audits require the cooperation and collaboration of those in leadership positions, as well as the trust of all involved to respond to the information and insights uncovered by the audit. After thoughtful discernment and deliberation, the Task Force recommends the audit portion of 2018-Do16 is better handled by the Executive Council and/or other bodies within the Church.

V. Enabling Continuing Work

The breadth and scope of the work mandated in Resolution 2018-Do16 is substantial. Paired with the significant disruption caused by the coronavirus pandemic, the Task Force recognizes the mandates of 2018-Do16 is more than can be accomplished within the current triennium. To meet all the mandates will require several triennia, if not decades, of work and effort to make significant inroads into creating new approaches and systems that value gender equality within the church. Gender parity in leadership opportunities, equality in wages, and attention to structures and cultures that value women are significant goals that will take time.

We have, however, begun the journey and are called by our faith in Jesus Christ to do this work and to strive for justice and dignity among all genders in the Episcopal Church, as well as be a witness to equality in our wider society.

Our Task Force requests that we be allowed to continue our work as a Task Force of the General Convention for the next 2 triennia, recognizing the continued challenges the current pandemic has created for the entire world. We ask that a budget of \$157,000 be allocated to our work for the next triennium. This will allow for three in-person meetings over the next triennium, consulting fees as we develop training modules, and costs associated with the beginning work for truth and reconciliation.

We also note that we as a Task Force and as the wider church need time for further discussion and evaluation of the survey results. If granted an additional triennium for the Task Force to do its work, we plan to share the findings with to the following members and organizations The Episcopal Church: The House of Bishops; The Executive Council; The National Association of Episcopal Schools; all Episcopal Seminaries (including diocesan formation programs for ordination); Episcopal Camps and Conference Centers; all Canons to the Ordinary; all Transition Officers; and any other bodies, organizations, or committees that the President of the House of Deputies or the Presiding Bishop deem necessary. We would then continue our work, as stated in 2018-Do16, of receiving responses from these organizations and members, reflecting on the information in the survey. These reflections include but are not limited to the following:

- How a specific church body and/or institution has contributed to a church culture of gender-based discrimination, harassment, and violence against women and girls in all their forms, when appropriate detailing specific examples of this culture that has approved of this behavior, ignored and/or excused this behavior, and how this culture has damaged the body and/or institution.
- The body and/or institution's plan of action that can bring about a culture of truth telling, repentance, reconciliation, and justice in our church; including a timeline of said plan of action.
- And any other questions the Task Force, in consultation with the Presiding Bishop and the President of the House of Deputies, deem helpful and necessary for the general Church to confess the truth of the impact of the sin of gender-based discrimination, harassment, and violence against women and girls in all their forms, and to engage the process of restoration and reconciliation.

Once this information has been received, the Task Force can begin to form the guidelines for the process of truth and reconciliation. The Task Force would seek, as stated in 2018-D016, not to create a one-size-fits-all process, but a process that would invite and guide churches, dioceses, provinces, and the general church to map their ways forward to justice, restoration, and reconciliation.

The Task Force will submit a Resolution at the upcoming General Convention reporting on the mandates met thus far and asking the General Convention to approve continuation of their work for the next two triennia.

Report on Gender-Based and Sexual Misconduct in The Episcopal Church for The Task Force for Women, Truth and Reconciliation

December 2020

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INTRODUCTION

In 2018, the 79th General Convention of The Episcopal Church approved a resolution to take concrete steps toward addressing “the sins of gender-based discrimination, harassment, and violence against women and girls in all forms.” Part of that resolution mandated a study of the experiences from the past, as well as an audit of institutional structures currently in place and the identification of those needed to address the problem going forward. This document is a report of the survey results, with analysis and recommendations based on the data. Because gender-based and sexual misconduct are experienced by not only women and girls, but also men, transgender persons and nonbinary persons as well, this survey included questions for persons of all genders in The Episcopal Church. The survey’s focus was on knowledge about the problem, opinions on Church-based training programs and processes for reporting, and perhaps most important, a reporting of personal experiences of misconduct, as well as attempts to support others who are victim/survivors. This study is intended to inform the longer process of seeking justice, reconciliation and restoration at all levels of the Church: local churches, dioceses, provinces and the full denomination.

METHODS

The survey (see Appendix A) was created by the Rev. Gail Murphy-Geiss, Ph.D., United Methodist clergywoman and Professor of Sociology at Colorado College, in consultation with a subcommittee of The Task Force for Women, Truth and Reconciliation. Modeled after a similar survey done in the United Methodist Church which focused on sexual misconduct, this survey was expanded to include questions related to gender-based misconduct as well, and the language was made more appropriate to the structures and culture of The Episcopal Church. The survey was created using Qualtrics software, in both English and Spanish, and distributed electronically in the Winter of 2020 through Directors of Communication in every diocese. It was left open through the Spring and into the early Summer of 2020.

Because the survey was not distributed to a random sample of Episcopalians, it is statistically impossible to generalize from these data to the entire Church. For example, just over 40% of survey respondents indicated that they had experienced some kind of gender-based or sexual misconduct in an Episcopal Church setting, but because victim/survivors are more likely to complete a survey on this topic, that percentage is surely higher than it would be if all Episcopalians had participated. Still,

the numbers can be helpful in delineating the types of experiences people have had, as well some measures of knowledge and opinion, especially as compared across demographic groups. Again, an example: it was expected that clergy would have better knowledge about reporting procedures than laity – that is confirmed here. In sum, readers should use these numbers with caution, knowing that they might not represent everyone in the denomination, but because the sample is very large, these respondents surely represent **many** in the Church.

DEMOGRAPHICS

There were 2415 usable responses, defined as those who filled out more than just a few demographic items, such that analysis of their experiences and opinions was possible. Tables 1a through 1c list the pertinent demographics examined, along with the number (N) and percent of respondents in each category. Table 1a specifically delineates the demographic breakdown of respondents by age, gender identity, sexual orientation and race/ethnicity.

Table 1a: Age, Gender, Sexual Orientation and Race/Ethnicity of All Respondents

Variables	N	%
Age by Decade		
Teens and 20s	77	3.3
30s	205	8.7
40s	253	10.7
50s	452	19.1
60s	731	30.9
70s	538	22.8
80 and up	106	4.5
TOTAL	2362	100.0
Gender Identity		
Cisgender Female	1608	67.3
Cisgender Male	740	31.0
Non-Binary	26	1.1
Transgender Male	8	0.3
Transgender Female	7	0.3
TOTAL	2389	100.0
Sexual Orientation		
Heterosexual	1822	76.4
Gay	209	8.8
Bisexual	135	5.7
Lesbian	105	4.4
Asexual	76	3.2
All Others	38	1.6
TOTAL	2385	100.0

Variables	N	%
Race/Ethnicity		
White	2235	93.3
Black	46	1.9
Hispanic/Latinx	42	1.8
Asian/Pacific Islander	35	1.5
Native American	30	1.3
Others	7	0.3
TOTAL	2395	100.0

Note that the large majority (58.2%) of participants were 60 or older, and in fact, almost half of that group were 70 or older. While the average American is 37 years old, the average Episcopalian is 57, so this sample is likely to be fairly representative of the members by age (Smith, 2019). Similarly, respondents are overwhelmingly white (93.3%) which is also close to the denominational figure of 87% (Smith, 2019). The 1.3% figure for Native Americans is likely high, as based on their responses to other questions, a few respondents clearly read the question in terms of their birth/citizenship as Americans, rather than as their race.

Surveys on sexual misconduct always attract more cisgender women than cisgender men, and a good number of nonbinary and transgender persons, often because they are more likely to have had experiences as victim/survivors. The same is true regarding sexual orientation: lesbian, gay and bisexual (LGB) people experience sexual violence at equal or higher rates than heterosexuals, while the rates of violence reported by transgender persons is even higher, up to 47% in some studies (Human Rights Campaign, 2015). So, while these numbers may not indicate the prevalence of misconduct in the denomination, they point to the persons who care most about the issue, and many who are likely to be the focus of reconciliation efforts.

Table 1b shows a second set of demographics: income, education level, and role in the Church. These respondents included more middle-income people (46.1%) than the denomination overall (34.0%) (Masci, 2014), and about 19% fewer from each of the other categories, both younger and older groups. Education levels map heavily onto clergy/lay status, as the large majority of clergy have completed graduate school, while graduate education is much rarer for the laity. Role in the church was reported in the survey in many more detailed subcategories, particularly for clergy (bishops, rectors, priests, deacons, etc.) but many and small groups are not viable for statistical analysis, so subgroups were combined as appropriate to each area examined. Also, because respondents reported incidents in the Church primarily, but also in schools (including seminary) and in workplaces (including Church-related offices), the latter two may also include a few incidents outside of The Episcopal Church entirely.

Table 1b: Income, Education Level and Church Role of All Respondents

Variables	N	%
Income Group		
\$0-\$25,000	188	8.0
\$25,001-\$50,000	406	17.3
\$50,001-\$75,000	537	22.9
\$75,001-\$100,000	545	23.2
\$100,001-\$150,000	427	18.2
\$150,001 and up	245	10.4
TOTAL	2348	100.0
Education Level		
Some HS, HS, GED	75	3.2
Associate's or Professional Certificate	170	7.1
Bachelor's	507	21.1
Graduate Degree	1646	68.6
TOTAL	2398	100.0
Church Role		
Clergy	924	39.3
Preparing for Ordination	47	2.0
Employees	306	13.0
Laity	1075	45.7
TOTAL	2352	100.0

A last demographic table (Table 1c) shows the Provinces from which respondents came, and the size of the churches they serve/attend. Response rates varied across the Church, probably based on the effectiveness of the dissemination efforts of those in charge of Communications in each diocese. The overwhelming majority of respondents were from the United States (only 9 came from outside the US), including participants from every state except New Mexico. As a result, these data should be seen as an assessment of the American Church only, since the experiences of Episcopalians outside of the United States are likely to be quite different. Regarding church size, 5% noted that they do not attend an Episcopal Church at all. That could be because they are responding as employees who work for the Church but who do not attend, or they have left the church and found the survey online.

Table 1c: Province (participants' states/regions/nations noted) and Church Size of All Respondents

Variables	N	%
Province		
I (CT, ME, MA, NH, RI, VT)	335	14.1
II (Europe, NJ, NY, VI's)	204	8.6
III (DE, MD, PA, VA, DC, WV)	294	12.4
IV (AL, GA, FL, KY, E. LA, MS, NC, SC, TN)	361	15.2
V (IL, IN, MI, E. MO, OH WI)	287	12.1
VI (CO, IA, MN, MT, NE, ND, SD, WY)	101	4.3
VII (AR, KS, W. LA, W. MO, TX, OK)	166	7.0
VIII (AK, AZ, CA, HI, ID, NV, OR, UT, WA)	592	25.0
IX (Dominican Republic, PR)	5	0.2
Don't Know/DNA	29	1.2
TOTAL	2374	100.0
Church Size		
1-49	466	19.8
50-149	1076	45.8
150-349	530	22.6
350	158	6.7
Do Not Attend	118	5.0
TOTAL	2348	100.0

KNOWLEDGE AND AWARENESS

The first set of substantive questions addressed awareness of policies, knowledge of incident reporting processes, and any training respondents had attended. Because awareness/knowledge/training often differs between clergy/professionals (for whom it is required) and laity, Table 2 depicts responses in terms of role in the Church by percent (number). As would be expected, for each measure, level of knowledge is statistically significantly higher for clergy, candidates for ordination and employees (combined for x2 analysis) than for laity (p < .0001). Just under half of the laity have attended a training, and fewer know about Church policies or where to report an incident. For the clergy, those with the highest awareness/knowledge/training, there are still many who are not adequately informed; for example, a full 20% say they would not know where to report an incident.

Those who indicated they knew where to report were invited to identify that resource in a text entry box. About two thirds (63.5%) named the Bishop and/or the Intake Officer. Another 6.8% named the Canon to the Ordinary, who was often identified as the Intake Officer. A small number (14.2%) said they would tell a priest and even fewer referenced the Warden or Vestry (1.4%) or the Police (1.8%). Clearly, the nature of the incident and the persons involved would lead people down different reporting paths. A notable minority (9.0%) recognized that complexity and said “it would depend” and named the persons to whom they would go in specific situations.

Respondents were also asked if they knew of an “agency” in the Church that provides support to victims. Only 9.2% (205) said they did. Those respondents were then asked to name that agency, and 125 people did so. Over half (52%; n = 65) of those respondents named something related to their diocese. The next most common response was a counseling services provider (14.4%; n = 18), followed by a local agency (12.0%; n = 15), most commonly a domestic violence shelter.

For those who attended an educational or training event (n = 1476), the large majority found it to be somewhat (44.8%) or very (43.7%) helpful. For those who identified the training more specifically, the most commonly reported was Safeguarding God’s Children/People (37.2%; n = 515), followed by Safe Church (24.3%; n = 335). Smaller numbers identified various unnamed trainings as simply “online” or “in-person” or “in the Diocese.”

Table 2: Percent (n)s of Respondents Who Are Aware of Policies, Know Where to Report, and Participated in Education/Training by Role in the Church

Variables	Know Them Well	Know They Exist	No/Not Sure
Awareness of Policies			
Clergy (910)	77.0 (701)	21.5 (196)	1.4 (13)
Candidates for Ordination (44)	50.0 (22)	45.5 (20)	4.5 (2)
Employees (303)	59.7 (181)	35.0 (106)	5.3 (16)
Laity (1053)	34.4 (361)	54.6 (575)	11.1 (117)
Know Where to Report	Yes	No/Not Sure	
Clergy (909)	79.9 (726)	20.1 (183)	
Candidates (44)	59.1 (26)	40.9 (18)	
Employees (303)	59.4 (180)	40.6 (123)	
Laity (1053)	43.8 (461)	56.2 (592)	
Attended Training	Yes	No	
Clergy (885)	84.6 (749)	15.4 (136)	
Candidates (42)	71.4 (30)	28.6 (12)	
Employees (296)	70.6 (209)	29.4 (87)	
Laity (1016)	48.0 (488)	52.0 (528)	

Respondents were also asked an open-ended question as to what would have made the training they attended better. The largest single group (15.8%; n = 78) said the information was outdated while another 10.3% (51) said it was repetitive of previous programs or trainings already done, often at work or in school. Quite a few respondents (17.2%; n = 85) named various topics that should be included or covered more fully, the most common being 1. boundaries, 2. power dynamics, 3. definitions and rules, and 4. reporting processes and enforcement. A few (9.3%; n = 46) hoped to see more case studies and get handouts while others (8.1%; n = 40) would like to have more interaction and group activities. A notable minority (6.7%; n = 33) noted the poor quality of the facilitator.

EXPERIENCES OF MISCONDUCT

Table 3 lists the percentages (numbers) of respondents who reported having experienced any misconduct at all, as well as those who experienced misconduct in an Episcopal Church setting, broken down into multiple subcategories. Variable categories are listed by number of respondents, highest to lowest. Cramer’s V scores for strength of association are noted where statistically significant. Note that in some cases, variable categories had to be combined for the analysis. Where there is no association, not significant (n.s.) appears.

Table 3: Percent (n)s of Respondents Who Experienced Misconduct at All/In an Episcopal Church Setting by Demographic

Variables	At All	In Church Setting
Gender Identity		
Cisgender Female (1608)	90.2 (1451)	45.7 (735)
Cisgender Male (740)	85.4 (632)	31.9 (236)
Non-Binary (26)	84.6 (22)	61.5 (16)
Transgender Male (11)	87.5 (7)	50.0 (4)
Transgender Female (7)	71.4 (5)	71.4 (5)
V/p for FC v MC v NB/MT/FT	.071/0.0008	.151/<.0001
Sexual Orientation		
Heterosexual (1822)	88.4 (1610)	39.5 (720)
Gay (224)	87.9 (197)	44.6 (100)
Lesbian (111)	90.1 (100)	58.6 (65)
Bisexual (143)	91.6 (131)	55.9 (80)
Queer (17)	100.0 (17)	94.1 (16)
V/p for H v GLBQ	n.s.	.101/<.0001
Race		
White (2287)	88.9 (2033)	41.8 (957)
Black (47)	87.2 (41)	42.6 (20)
Hispanic/Latinx (45)	86.7 (39)	51.1 (23)
Asian (34)	79.4 (27)	32.4 (11)
Native American (32)	87.5 (28)	46.9 (15)
V/p for W v. People of Color (POC)	n.s.	n.s.
Age Group		
60 (1373)	57.7 (792)	34.7 (476)
40-59 (705)	88.5 (624)	50.1 (353)
18-39 (282)	86.2 (243)	56.0 (158)
V/p	.210/<.0001	.175/<.0001
Role in the Church		
Laity (1075)	88.5 (951)	24.6 (264)
Clergy (924)	89.7 (829)	61.5 (568)
Employees (306)	89.2 (273)	44.4 (136)
Candidates (47)	87.2 (41)	57.4 (27)
V/p	n.s.	.347/.000

Note that there is no difference by race in either category, and regarding sexual orientation and role in the Church, differences only exist for experience of misconduct in Church settings. Where there are differences, cisgender women are most likely to have experienced any misconduct at all, but transgender/nonbinary persons are most likely to have experienced it in a Church setting. Older persons are less likely than the other two age groups to have experienced misconduct in either condition, but it is hard to know whether such reports indicate fewer experiences or less awareness in earlier eras. Clergy and candidates for ordination are far more likely to experience misconduct in the Church than lay persons, with employees falling in between.

Another analysis of interest is the different rates of misconduct experienced at the intersection of gender and role in a Church setting, particularly out of concern for cisgender clergywomen, transgender and nonbinary clergy. Table 4 shows the percentages (numbers) for those subgroups, with statistically significant strength of associations noted as Cramer’s V scores/p values. Cisgender clergywomen and transgender/nonbinary clergy have similar and very high reporting rates, as compared to cisgender clergymen, with a fairly high V-score of .324 indicating a strong correlation between gender and having experienced misconduct. Likewise, transgender/nonbinary laity have higher rates than cisgender laywomen, who have somewhat higher rates than laymen. Still, most of these cisgender laity have not experienced misconduct, while half of the 14 trans/nonbinary lay respondents have. For employees, cisgender men are the most likely to report misconduct, but not statistically different than cisgender women. The difference for employees is only notable when compared to trans/nonbinary respondents. Though only five people, 100% of these trans/nonbinary employees reported misconduct of some kind.

Table 4: Percent (n)s Who Experienced Misconduct in a Church Setting by Gender and Role in the Church

Role and Gender Identity	Yes	No	V/p
Cis Clergywomen (595)	73.1 (435)	26.9 (160)	.324/.000
Cis Clergymen (308)	39.6 (122)	60.4 (186)	
Trans/Non-Binary Clergy (7)	71.4 (5)	28.6 (2)	
Cis Female Employees (195)	42.6 (83)	57.4 (112)	.148/.036
Cis Male Employees (106)	45.3 (48)	54.7 (58)	
Trans/Non-Binary Employees (5)	100.0 (5)	0	
Cis Laywomen (753)	25.9 (195)	74.1 (558)	.092/.011
Cis Laymen (301)	19.9 (60)	80.1 (214)	
Trans/Non-Binary Laity (14)	50.0 (7)	50.0 (7)	

Specific behaviors were provided and respondents indicated if and where they had experienced such behaviors – in a local church, at school or in a workplace. Table 5a lists those percentages (numbers), listed in order from the most to the least commonly experienced in a Church setting. Percentages are

taken from all 2415 respondents; note that they were invited to check all that apply, both for behavior and location.

Table 5a: Percent (n)s of Those Reporting Specific Behaviors by Location (N = 2415)

Behaviors	Church	School	Workplace
Comments/Teasing/Jokes	31.8 (767)	9.9 (238)	18.2 (439)
Touching/Closeness	23.9 (577)	4.4 (107)	8.5 (205)
Looks/Leers	22.3 (539)	6.0 (144)	10.1 (243)
Pressure to Engage in Comments	16.5 (399)	5.9 (143)	10.5 (253)
Attempt to Fondle/Kiss	11.1 (268)	2.6 (62)	4.3 (104)
Pressure to Date/Sexual Activities	7.8 (189)	3.1 (76)	4.1 (100)
Emails/Texts/Letters	6.3 (152)	1.6 (39)	4.0 (96)
Attempted Assault/Rape	2.9 (71)	1.6 (38)	1.4 (34)
Offer to Influence for Sexual Favors	2.1 (51)	0.6 (15)	1.9 (47)
Completed Assault/Rape	1.9 (47)	0.9 (22)	0.7 (17)

Note that comments/teasing/jokes are the most commonly experienced types of misconduct in all three settings, but #2 in a Church setting is touching/closeness, as compared to in school or the workplace, where it is #4. Because touching, through the ritual of the passing of the peace or more casual greeting/hugging is common in many churches, these behaviors can become problematic more easily than in professional settings. One clergywoman wrote, “One man made passing the peace an assault routinely.” Sometimes, the misconduct is intentionally inappropriate, but often, although offered innocently, it is received with discomfort. One respondent wrote, “The church, by its very nature, fosters emotionally intimate relationships. As a cisgendered white heterosexual man, I naturally assume the best about a situation, others might potentially find problematic, so I just need to be aware.”

Another way to look at these behaviors is based on demographic group. Table 5b shows the percentages of each statistically significantly association of behavior by gender identity, with statistically significant scores indicated. The statistically significant differences are seen only in the most commonly experienced/least egregious behaviors. For behaviors not listed, there was no difference by gender.

Table 5b: Percentages of Those Reporting Specific Behaviors by Gender Identity

Behaviors	Cis Female (1608)	Cis Male (740)	Trans/N-B (41)	V
Comments/Teasing/Jokes	36.8	19.9	56.1	.181***
Touching/Closeness	27.2	16.4	39.0	.126***
Looks/Leers	26.4	13.5	34.1	.146***
Pressure to Engage in Comments	18.5	11.9	31.7	.097***
Attempt to Fondle/Kiss	12.9	7.4	14.6	.077***

Table 5c shows the same behaviors regarding sexual orientation. Again, only statistically significant associations are included, but in this case, all behaviors show differences by sexual orientation except for “completed sexual assault,” and all are more commonly reported by LGBQ persons than others.

Table 5c: Percentages of Those Reporting Specific Behaviors by Sexual Orientation

Behaviors	Heterosexual (1822)	LGBQ (475)	V
Comments/Teasing/Jokes	30.3	39.8	.082***
Touching/Closeness	22.7	29.9	.068**
Looks/Leers	21.3	28.8	.073***
Pressure to Engage in Comments	15.7	21.3	.136***
Attempt to Fondle/Kiss	10.3	14.9	.059**
Pressure to Date/Sexual Activities	6.5	12.8	.095***
Emails/Texts/Letters	5.6	9.7	.067**
Attempted Assault/Rape	2.4	5.3	.068**
Offer to Influence for Sexual Favors	1.8	3.8	.056*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

Table 5d shows the same behaviors regarding role in the Church. All behaviors are differently experienced by role, with laity the least likely to experience every type and clergy the most likely to experience every type except for completed assault, which was slightly more often reported by employees.

Table 5d: Percentages of Those Reporting Specific Behaviors by Role in the Church

Behaviors	Clergy (924)	Employees (306)	Laity (1075)	V
Comments/Teasing/Jokes	50.3	31.4	16.5	.337***
Touching/Closeness	39.6	25.2	10.9	.311***
Looks/Leers	36.0	23.9	10.8	.280***
Pressure to Engage in Comments	28.5	17.6	6.1	.279***
Attempt to Fondle/Kiss	18.8	10.8	4.7	.207***
Pressure to Date/Sexual Activities	12.7	9.1	3.7	.154***
Emails/Texts/Letters	11.6	6.5	1.8	.187***
Attempted Assault/Rape	4.9	3.2	1.4	.094***
Offer to Influence for Sexual Favors	3.7	2.6	0.6	.098***
Completed Assault/Rape	2.7	2.9	1.2	.055*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

A last comparison of behaviors to consider is by clergy status. There were many subgroups, but most of the differences between priests were negligible. The difference between priests, including

bishops, and deacons was statistically significant and therefore notable, as seen in Table 5e. For every behavior listed, priests were more likely to report misconduct than deacons.

Table 5e: Percentages of Clergy Reporting Specific Behaviors by Ordination Status

Behaviors	Priests (573)	Deacons (84)	V
Comments/Teasing/Jokes	59.5	30.9	.192***
Touching/Closeness	55.3	20.2	.166***
Looks/Leers	43.6	13.1	.208***
Pressure to Engage in Comments	34.7	14.3	.146***
Attempt to Fondle/Kiss	21.5	5.9	.131**
Pressure to Date/Sexual Activities	13.3	8.3	.821***
Emails/Texts/Letters	14.6	5.9	.085*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

Another set of questions focused on specifically gender-based harassment, asking about behaviors that do not use sex as weapon, but slurs, taunts, stereotypes, or even threats of violence based on one’s perceived gender (see Appendix A for full wording of the questions). Table 6 shows the first set of behaviors examined for all respondents. Here, the response of “not sure” is important because many of these behaviors are subtle and often hard to identify as gender-based, and even harder to report or investigate.

Table 6: Percent (n)s of Those Reporting Gender-Based Harassment Behaviors

Behaviors	Yes	Not Sure	No
Targeted Rules	9.6 (202)	14.1 (296)	76.3 (1603)
Treated Discourteously	41.7 (878)	7.3 (154)	50.9 (1071)
Contributions Overlooked	31.8 (670)	13.4 (282)	54.8 (1154)
Participation Discouraged	23.1 (486)	11.7 (246)	65.2 (1373)

The next set of behaviors are most likely to be experienced by transgender and nonbinary persons, provided in Table 7. Even though a small sample overall, note that the majority of trans or nonbinary persons reported having experienced many of these behaviors.

Table 7: Percent (n)s of Those Reporting Specific Gender-Based Harassment Behaviors by Gender Identity

Behaviors	Trans Female (7)	Trans Male (8)	Non-Binary (26)
Misgendered	57.1 (4)	75.0 (6)	23.1 (6)
Rejection/Ostracization	57.1 (4)	50.0 (4)	19.2 (5)
Failure to Recognize Your Gender	42.9 (3)	62.5 (5)	34.6 (9)
Excluded from Activities	14.3 (1)	37.4 (3)	34.6 (9)
Restroom Restrictions	0	50.0 (4)	11.5 (3)
Name Calling	25.6 (2)	12.5 (1)	11.5 (3)
Violence or Threats of Violence	14.3 (1)	12.5 (1)	0
Deadnaming (use of previous name)	25.6 (2)	62.5 (5)	7.7 (2)

As expected, the large majority (83.1%; n = 2004) of perpetrators of all problematic behaviors (sexual and gender-based) were cisgender men, with 16.2% (n = 390) as cisgender women and less than 1% (n = 18) as transgender or nonbinary ($\chi^2 = 2772.63$; $p < .0001$).

In Church settings, the most common perpetrators were church members (38.8%; n = 446), followed by local church priests (28.8%; n = 331); in employment settings, the most common perpetrators were colleagues (44.2%; n = 168), followed by supervisors (33.9%; n = 129); in seminaries, the most common perpetrators were fellow students (48.0%; n = 84), followed by teachers and administrators (34.9%; n = 61). Notably, the most common perpetrators in all three settings were not the traditionally most powerful persons. Church members, work colleagues and fellow students have been more problematic than priests, supervisors and professors. Perhaps credential leaders have undergone training that helps minimize the chances of them being offenders, while ordinary members of a community do not necessarily receive that training.

Among the 673 who answered the question regarding their awareness of other victim/survivors of that perpetrator, 43.6% said they were aware of others. It is also likely that other perpetrators had additional victim/survivors unknown to the survey respondents. Not surprisingly, many perpetrators, from the most innocent to the most egregious, misbehave regularly, so most have multiple victim/survivors.

RESPONSES TO MISCONDUCT

Respondents who had been the recipients of misconduct were provided with a list of possible reactions.

Responses differed by gender identity, as depicted in Table 8, listed in order of percent, high to low, of all respondents.

Table 8: Percent (n)s of Those Reporting Specific Reactions to Misconduct by Gender Identity

Reactions	All	Cis Female	Cis Male	Trans/N-B	V
Ignored/Went Along	28.7 (694)	35.5 (539)	18.6 (138)	41.5 (17)	.156***
Avoided the Person	27.1 (654)	31.4 (505)	17.7 (131)	43.9 (18)	.152***
Told Colleague/Friend	19.4 (468)	23.6 (379)	9.9 (73)	39.0 (16)	.178***
Told Person to Stop	18.6 (449)	21.9 (352)	12.2 (90)	17.1 (7)	.112***
Told Supervisor	11.1 (268)	13.9 (224)	5.1 (38)	14.6 (6)	.131***
Transferred/Quit	4.7 (114)	5.7 (92)	2.4 (18)	9.7 (4)	.079**
Threatened to Report	2.3 (55)	2.9 (46)	1.1 (8)	2.4 (1)	.055*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

The majority of respondents took the path of least resistance and either ignored the behavior or avoided the person. The next largest group, looking for support, told a colleague or friend. Only after that did respondents indicate that they had taken the difficult step of telling the perpetrator to stop or reporting to a supervisor.

Respondents who indicated that they reported to a supervisor were also asked how that went. Were they believed and supported, or dismissed, or even disciplined? Table 9 provides all of the response options with the few demographic variables which yielded statistically significant associations – race, gender identity and sexual orientation. Responses are listed in order of percent selected by all respondents. Note that people of color were more likely to be trivialized, and cisgender males and LGBTQ persons more likely to be believed. There were no differences by role in the Church and the other supervisor responses did not differ by any group.

Table 9: Percent (n)s of Supervisor Responses by Race, Gender and Sexual Orientation

Responses	All	White	POC	Hetero	LGBQ	Cis F	Cis M
Trivialized	51.1 (137)	16.7 (42) V =	38.9 (7) .1434*				
				36.8 (77) V =	54.0 (27) .138*	36.2 (81) V =	55.3 (21) .138*
Believed	39.9 (107)						
Too Minor to Pursue	24.2 (65)						
Not Believed	20.5 (55)						
Investigation Done	18.3 (49)						
Discounted	10.8 (29)						

*p ≤ .05. **p ≤ .01. ***p ≤ .001

The survey acknowledged that there are many good reasons NOT to report, which is actually much more common. The following tables show the reasons people said they did not report an incident, with the demographic variables of difference and Cramer’s V scores for strength of association. The large number of statistically significant associations warrants separate tables for each demographic analysis, but only those reasons with such a correlation are included. For each table, reasons are listed in the order selected by all respondents; the first table includes all reasons, even if no difference by demographic.

Table 10a: Percent (n)s of Those Reporting Specific Reactions not to Report by Gender Identity

Reasons	All	Cis Female	Cis Male	Trans/N-B	V
Too Minor	18.3 (338)	19.8 (243)	15.0 (89)	21.4 (6)	.059*
Nothing Would be Done	17.0 (314)	19.4 (238)	10.8 (64)	42.8 (12)	.137***
Would be Held Against Me	16.2 (300)	17.8 (219)	11.8 (70)	39.3 (11)	.109***
Too Embarrassed	9.0 (167)	9.8 (120)	6.6 (39)	28.6 (8)	.099***
Wouldn’t be Believed	7.6 (141)	9.0 (110)	4.2 (25)	21.4 (6)	.105***
Would be Blamed	7.5 (139)	9.0 (110)	3.7 (22)	25.0 (7)	.124***
Didn’t Know the Process	6.9 (127)	7.3 (90)	5.4 (32)	17.8 (5)	.064***
Not Hurt the Person	6.3 (117)	6.3 (77)	5.7 (34)	21.4 (6)	.078**
Loss of Income	3.6 (66)	3.8 (47)	2.9 (17)	7.1 (2)	n.s.
Retaliation Threatened	2.0 (38)	1.9 (24)	2.0 (12)	7.1 (2)	n.s.

*p ≤ .05. **p ≤ .01. ***p ≤ .001

Regarding gender differences, it is notable that the first and second choices for all cisgender respondents was that the incident was too minor, or that they feared nothing would be done. For transgender/nonbinary respondents, the top two reasons were fear that nothing would be done, followed by fear that it would be held against them. For the latter group, the idea that the incident was too minor was much further down the list at #5, after fearing embarrassment and blame. Note also that the last two reasons in Table 10a show no difference between cisgender males and females, but there is a big difference between those groups and transgender/nonbinary persons, the latter being much more likely to not know the process and to not want to hurt the person.

Table 10b: Percent (n)s of Those Reporting Specific Reactions not to Report by Sexual Orientation

Reasons	All	Hetero	LGBQ	V
Nothing Would be Done	17.7 (315)	14.8(207)	24.8 (93)	.109***
Would be Held Against Me	16.8 (299)	13.4 (188)	25.6 (96)	.136***
Too Embarrassed	9.4 (168)	7.6 (106)	15.2 (57)	.108***
Wouldn’t be Believed	7.9 (141)	6.8 (96)	10.4 (39)	.055*
Would be Blamed	7.8 (139)	6.6 (92)	10.9 (41)	.068**
Financial Loss	3.7(66)	2.7 (38)	6.4 (24)	.082***

*p ≤ .05. **p ≤ .01. ***p ≤ .001

In the case of sexual orientation, LGBTQ persons were more likely than heterosexual respondents to identify each of the reasons listed in Table 10b. Note that the most common response above, of seeing the incident as too minor, was not among those that differed by sexual orientation – LGBTQ and heterosexual respondents were equally likely to select that.

Table 10c: Percent (n)s of Those Reporting Specific Reactions not to Report by Age Group

Reasons	All	18-39	40-59	60	V
Too Minor	18.3 (336)	25.1 (51)	23.5 (119)	14.7 (166)	.116***
Nothing Would be Done	16.9 (310)	22.7 (46)	21.3 (108)	13.8 (156)	.102***
Would be Held Against Me	16.1 (295)	27.1 (55)	19.9 (101)	12.3(139)	.139***
Too Embarrassed	9.1 (167)	14.3 (29)	11.2 (57)	7.2 (81)	.166***
Would be Blamed	7.5 (137)	12.3 (25)	10.0 (51)	5.4 (61)	.101***
Not Hurt the Person	6.2 (113)	9.8 (20)	7.1 (36)	5.1 (57)	.066*
Financial Loss	3.5 (65)	7.9 (16)	3.7 (19)	2.7 (30)	.087***

*p ≤ .05. **p ≤ .01. ***p ≤ .001

Regarding age differences, younger respondents were more likely to identify all of the reasons listed in Table 10c, with older people less likely, and those in middle life falling in between. Note that for the two most commonly cited reasons, the differences between younger and middle-aged persons are negligible. But surprisingly, older respondents were much less likely to think an incident was minor or that nothing would be done than all other respondents. If standards around these behaviors have been changing, one would expect the older respondents to be more tolerant of “minor” offenses. The differences by age group for the other reasons are more evenly spread.

Table 10d shows differences in reasons by income. Not surprisingly, lower income respondents were most likely to fear being blamed, while upper income respondents were the least likely to fear that nothing would be done.

Table 10d: Percent (n)s of Those Reporting Specific Reactions not to Report by Income Group

Reasons	All	0-\$50K	\$51K-\$100K	\$101K	V
Nothing Would be Done	17.0 (309)	16.1 (75)	19.4 (158)	14.1 (76)	.061*
Wouldn't be Believed	7.6 (139)	10.3 (48)	6.9 (56)	6.5 (35)	.059*
Would be Blamed	7.5 (136)	9.4 (44)	7.8 (64)	5.2 (28)	.061*
Didn't Know the Process	6.9 (125)	6.9 (32)	8.3 (68)	4.6 (25)	.062*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

The last examination of reasons not to report considers role in the Church. Employees were the most likely to fear financial losses, which makes sense given that the misconduct occurred in their

workplace. Otherwise, clergy were the most likely to cite each of the reasons listed in Table 10e. Also notable is the strongest V-score of .224 regarding fear that the report would be held against them. This was a major concern for clergy and a bit less so for employees, both of whom might be worried about their jobs and possibilities for advancement.

Table 10e: Percent (n)s of Those Reporting Specific Reactions not to Report by Role in the Church

Reasons	All	Clergy	Employees	Laity	V
Too Minor	18.5 (339)	26.8 (173)	23.1 (53)	11.4 (105)	.188***
Nothing Would be Done	17.1 (313)	23.8 (154)	18.8 (43)	11.8 (108)	.149***
Would be Held Against Me	16.4 (299)	26.5 (171)	21.8 (50)	7.5 (69)	.244***
Too Embarrassed	9.1 (166)	12.4 (80)	8.3 (19)	6.5 (60)	.095***
Wouldn't be Believed	7.7 (140)	9.6 (62)	7.4 (17)	6.2 (57)	.059*
Would be Blamed	7.5 (138)	9.7 (63)	10.5 (24)	5.2 (48)	.090***
Not Hurt the Person	6.3 (116)	9.0 (58)	7.9 (16)	3.9 (36)	.098***

*p ≤ .05. **p ≤ .01. ***p ≤ .001

There were very few differences by race in the entire survey, but there was one statistically significant association in the case of reasons not to report: the threat of retaliation. People of color were more likely (5.9%; n = 7) to report such a threat than white people (1.8%; n = 31; V = .071**).

A text box allowed people to name other reasons for not reporting. Of the 55 responses, 38.2% (21) said they handled it themselves, followed by 20.0% (11) who said they left the local church or diocese. Another 12% (7) of respondents said that they went to a therapist instead. The few others said they were too shocked to do anything for a long time, or they were children when the incident occurred.

IMPACT OF RESPONSES TO MISCONDUCT

Participants were then asked about how their responses affected their lives. As in the previous section, the following tables show the various effects where there were demographic differences. The highest number of differences (8) were based on role in the Church, as seen in Table 11a. For this first table, all of the options are listed, including one (Things Got Worse) that showed no difference by role.

Laypersons were the least likely to report that things had gotten better, while clergy were the most likely to say that things had gotten better for others, but not themselves. Clergy were also the most likely to say that nothing had changed or that they had lost income. Employees were the most likely to say that it was hard to find another position or that the misconduct was still happening.

Table 11a: Percent (n)s of Those Reporting Specific Effects of Their Responses by Role in the Church

Effects	All	Clergy	Employees	Laity	V
Little or No Change	17.9 (383)	24.6 (204)	18.7 (51)	12.3 (117)	.185***
Things Got Better	11.1 (238)	16.4 (136)	12.4 (34)	6.5 (62)	.146***
Results Varied (multiple incidents)	10.7 (228)	16.6 (138)	13.2 (36)	4.8 (46)	.180***
Better for Me/System the Same	9.6 (205)	15.9 (132)	7.7 (21)	5.0 (48)	.172***
I Left	9.3 (198)	13.7 (114)	8.8 (24)	5.6 (53)	.131***
Things Got Worse	3.9 (83)	5.1 (42)	5.5 (15)	2.4 (23)	n.s.
Lost Income	3.6 (77)	6.4 (53)	4.0 (11)	1.3 (12)	.126***
It's Still Happening	1.5 (33)	0.7 (6)	4.0 (11)	1.4 (13)	.087***
Hard to Find New Position	1.3 (29)	1.8 (15)	2.2 (6)	0.6 (6)	.057*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

Tables 11b and 11c show the demographics with the next highest number of differences (6), gender identity and age group. Note that where respondents indicated varied results, it was because of multiple incidents.

Table 11b: Percent (n)s of Those Reporting Specific Effects of Their Responses by Gender Identity

Effects	All	Cis Female	Cis Male	Trans/N-B	V
Little or No Change	17.9 (383)	19.4 (281)	14.2 (90)	29.4 (10)	.072**
Results Varied	10.7 (228)	12.8 (186)	4.7 (30)	29.4 (10)	.142***
Better for Me/System the Same	9.6 (205)	11.1 (162)	5.4 (34)	26.4 (9)	.115***
I Left	9.3 (198)	10.7 (155)	5.4 (34)	20.6 (7)	.097***
Things Got Worse	3.9 (83)	4.8 (70)	1.9 (12)	2.9 (1)	.069**
Lost Income	3.6 (77)	4.3 (62)	2.4 (15)	0	.046*

*p ≤ .05. **p ≤ .01. ***p ≤ .001

Although few in number overall, cisgender females were the most likely to say that things got worse or that they lost income, while transgender/nonbinary respondents were the most likely to report little change at all, no change in the system, or that they left the situation (church, job, school).

Table 11c: Percent (n)s of Those Reporting Specific Effects of Their Responses by Age Group

Effects	All	18-39	40-59	60	V
Little or No Change	17.9 (383)	26.7 (65)	22.2 (139)	14.1 (174)	.125***
Things Got Better	11.1 (238)	9.9 (24)	13.8 (86)	10.1 (125)	.053*
Results Varied	10.7 (228)	20.6 (50)	14.7 (92)	6.8 (84)	.161***
I Left	9.3 (198)	14.4 (35)	11.4 (71)	7.2 (89)	.090***
It's Still Happening	1.5 (33)	5.3 (13)	2.2 (14)	0.5 (6)	.126***
Hard to Find New Position	1.3 (29)	2.5 (6)	2.2 (14)	0.6 (8)	.071**

*p ≤ .05. **p ≤ .01. ***p ≤ .001

In the case of age, younger respondents were more likely to report little/no change or having left the situation. This may be a cohort effect. That is, it is possible that raised awareness over the years has made gender-based and sexual misconduct less tolerable, so younger respondents may have a higher bar for the responses they expect in the church/workplace/school. That is, it may not be that change is not happening for younger people, or more recently, but that smaller changes were more acceptable in the past. Alternatively, it could be that younger people feel less powerful to effect the changes they desire.

Regarding income groups, there were only two differences of note. Unsurprisingly, lower income respondents were most likely to say that they had lost income (5.5%; n = 29) than those in the higher income groups (combined 3.1%; n = 48; V = .015*), and more likely to say it was hard to find a new position (2.5%; n = 13) than the others (1.0%; n = 16; V = .054*). Regarding race, people of color were more likely to say that things had gotten better for them but the system had not changed (3.6%; n = 5) than whites (0.9%; n = 19; V = .063*).

IMPACT OF MISCONDUCT ON LIVES

The next set of questions asked about impact on one’s life, focusing on church/work/school participation and also personal health. Table 12a shows the full list of options, with scores for all respondents, both in percent (n)s in each category, and also the mean (m) scores from 1 to 3, with 1 indicating that things got worse to 3 indicating that they got better. The options are listed in the order they appeared in the survey, based on topic.

As noted in yellow, the most common response to almost all of the options was that there was no change, although feelings about work, mental health and emotional health were more likely to get worse – emotional health by a lot. Based on means, the options that had the best outcomes (noted in green) were school attendance, one’s relationship with God and also one’s spiritual practices. School attendance is likely required, but relationship with God and spiritual practices are more personal. Means highlighted in purple are the options with the worst outcomes – emotional health and feelings about work again, and also feelings about one’s local church. It seems that even when one’s feelings about a specific local church are harmed, one’s spiritual practices and relationship with God do not suffer similarly.

Table 12a: Percent (n)s and Means on a Scale of 1-3 of Impact on One’s Life

Impacts	Got Worse	No Change	Got Better	m
Worship Attendance (757)	22.1 (167)	75.6 (572)	2.4 (18)	1.81
Church Involvement (780)	28.2 (220)	68.1 (531)	3.7 (29)	1.76
Feelings about Local Church (838)	47.3 (396)	49.8 (417)	3.0 (25)	1.56
Work Attendance (655)	11.5 (75)	88.1 (577)	0.5 (3)	1.89
Quality of Work (698)	20.1 (140)	75.8 (529)	4.2 (29)	1.84
Feelings about Work (752)	49.5 (372)	47.1 (354)	1.1 (26)	1.54
School Attendance (374)	9.4 (35)	88.5 (331)	2.1 (8)	1.93

REPORTS TO THE 80th GENERAL CONVENTION

Impacts	Got Worse	No Change	Got Better	m
Quality of School Work (374)	16.3 (61)	81.6 (305)	2.1 (8)	1.86
Feelings about School (373)	25.7 (96)	72.9 (272)	1.3 (5)	1.76
Feelings about The Episcopal Church (862)	42.3 (365)	54.9 (473)	2.8 (24)	1.60
Relationship with God (1546)	21.1 (183)	64.2 (558)	14.7 (128)	1.93
Spiritual Practices (1542)	24.5 (214)	59.8 (522)	15.7 (137)	1.91
Feelings about Self (1513)	43.6 (393)	48.3 (436)	8.1 (73)	1.65
Physical Health (1563)	28.3 (241)	67.3 (573)	4.5 (38)	1.76
Mental Health (1511)	46.9 (424)	46.5 (420)	6.6 (60)	1.60
Emotional Health (1487)	56.3 (522)	36.1 (335)	7.7 (71)	1.52
Financial Health (1644)	21.3 (164)	76.4 (589)	2.3 (18)	1.81

Table 12b shows mean scores, indicating the same impacts by various demographics of interest where there was statistically significant difference between groups. Regarding gender identity, cisgender men report a higher mean than others. That is, cisgender men are more likely to report improvement than decline compared to all other respondents. On the other hand, assessment of things getting worse varied by item between cisgender women and transgender/nonbinary respondents. The same is true for heterosexuals in comparison with LGBTQ respondents – the mean for heterosexuals was consistently higher, although there was only a difference on four items. Results vary more by role in the Church, with laity reporting the highest means on the three health measures listed, and clergy reporting higher means on measures related to the local church and spiritual life.

Table 12b: Means on a Scale of 1-3 of Impact on One’s Life by Demographics

Impacts	CisF	CisM	TrNB	p	Het	LGBQ	p	Clergy	Emp	Laity	p
Worsh Attend	1.78	1.89	1.85	.02	--	--	n.s.	1.86	1.80	1.73	.002
Ch Involve	--	--	--	n.s.	--	--	n.s.	1.83	1.73	1.66	.000
Feel @ Loc Ch	1.51	1.70	1.36	.000	--	--	n.s.	--	--	--	n.s.
Qual Wk	--	--	--	n.s.	1.86	1.78	.05	--	--	--	n.s.
Feel @ Wk	1.48	1.69	1.57	.000	1.57	1.47	.04	1.50	1.47	1.71	.000
Sch Attend	1.93	1.95	1.67	.05	--	--	n.s.	--	--	--	n.s.
Qual Sch Wk	1.83	1.95	1.50	.002	--	--	n.s.	--	--	--	n.s.
Feel @ Sch	1.72	1.88	1.44	.002	--	--	n.s.	--	--	--	n.s.
Feel @ TEC	1.58	1.69	1.59	.04	--	--	n.s.	--	--	--	n.s.
Relat w/ God	--	--	--	n.s.	1.97	1.85	.02	1.98	1.80	1.94	.01
Spirit Pracs	--	--	--	n.s.	1.94	1.82	.02	1.95	1.79	1.90	.05
Feel @ Self	1.61	1.77	1.46	.002	--	--	n.s.	--	--	--	n.s.
Phys Health	1.72	1.90	1.64	.000	--	--	n.s.	1.73	1.75	1.90	.05
Ment Health	1.55	1.74	1.52	.000	--	--	n.s.	1.57	1.54	1.68	.03
EmoHealth	1.46	1.68	1.56	.000	--	--	n.s.	1.49	1.42	1.63	.002

Not included in the table, age by group and race were also examined. There were nine outcomes that showed difference by age group; in every case, older respondents reported higher means/more improvement than the youngest respondents, with middle-aged people falling in between. There were no differences in any outcome by race.

There was also a text box for people to write-in other effects or comments about any impact on their lives; responses varied widely. Of the 127 respondents who wrote something there, 34.6% (44) reported a positive impact, such as that the person apologized or that they developed strong boundaries as a result of the experience. However, the majority (57.5%; n = 73) reported something negative, such as lost opportunities or diminished self-esteem. The rest (15.0%; n = 19) said something more neutral, such as that the perpetrator happened to move away or retire.

WITNESSING MISCONDUCT OF OTHERS

Almost half of all respondents (42.5%) said they had witnessed someone else as the target of gender-based or sexual misconduct and another 31.2% were told about an incident by someone else, either the victim/survivor or another witness. That means a full 73.7% (812) knew of an incident, whether they themselves had experienced one or not. These respondents were then asked how they responded to that information.

With the option of “check all that apply,” the most common response was to speak to someone else about it (58.2%), followed by speaking directly to the victim (48.4%). All of the other responses were about equally selected: ignored it (14.2%), spoke to the perpetrator (12.4%), initiated the misconduct process (12.1%), and reflected on one’s own behavior (15.9%).

There were a few notable differences by demographic group regarding those responses. Laity were most likely to ignore the behavior (22.6%; n = 42), while clergy were the least likely to do so (10.2%; n = 50), with employees falling in between (17.3%; n = 19; $V = .152^{***}$). Younger respondents were most likely to speak to the victim (60.4%; n = 67), while older respondents were the least likely to do so (39.4%; n = 157), with middle-aged persons falling in between but closer to the response rate of their juniors (55.6%; n = 163; $V = .177^{***}$). Because cisgender men are most likely to be perpetrators of misconduct, it is good to see that they were most likely to reflect on their own behavior (25.5%; n = 49) if they witnessed or heard about an incident, with cisgender women (12.7%; n = 76) and transgender respondents (10.0%; n = 2; $V = .151^{***}$) less likely to do so.

Many people respond to later events differently than earlier ones, based on training, growth in wisdom or courage that comes with age, or just the benefit of experience in general. One of the biggest problems with sexual misconduct in particular is delayed reporting, where an incident is ignored for a while, but is reported, sometimes years later, often with an unsatisfactory outcome because witnesses and evidence have disappeared over time. To capture some of this, an open-ended question was asked regarding what respondents would do if they witnessed a similar incident today. Of the 312 participants who wrote in a response, 59.6% said they would report it. The next most common response was something related to calling out the behavior (39.1%), either in the

moment or quickly thereafter – some speaking to the perpetrator, others to the victim/survivor. It is impossible to predict future reactions based on a hypothetical, unspecified situation, but at least the intent to intercede in a more productive way is promising.

ANYTHING ELSE YOU WANT THE EPISCOPAL CHURCH TO KNOW

The last survey question allowed respondents to add anything else that might be important to them. Over a quarter (27.9%) of survey participants did so, and seven major themes were identified: personal stories, thanks, positive experiences, larger social context, lay/clergy differentials, process critiques and gender identity-related micro-aggressions.

Personal stories made up 19.7% (133) of the comments and they varied widely. Some talked about sexual assault experienced as children, others about the specific dynamics around their experience, such as a small, financially struggling church for whom reporting would have caused too much loss. One woman recounted her discovery years later that ten women had been harassed by the same bishop. Another talked about a history of multiple incidents, from a rape in a childhood parish, to inappropriate behavior of seminary professors, to various biases against them as a gay priest – retirement has finally brought a sense of relief and the ability to seek out a “safe” spiritual community.

Also notable were the 16.9% (114) who gave some message of thanks – for the survey/research and opportunity to tell their story, for the efforts at reconciliation that are underway, for educational events and other ways the Church is trying to improve. One person said simply, “Thank you for not running away from this issue.”

Another large minority (12.7%; n = 86) wanted to be sure to note that their experiences have been positive, even “exceedingly wonderful” in one person’s words. Many said they had not experienced any harm in the church, although they had elsewhere. Others noted that the Church has been one of the safest places in their life. Another said “I’m proud that The Episcopal Church is taking these things seriously.” A few minimized the problem, saying it is not a problem in the Church, that they think the Church does a great job or is impressively open to all persons, or they have simply never even heard of an incident, but such comments were few in number. Of course, surveys on gender-based and sexual misconduct are of much more interest to people who are aware of the problem than others, so those few comments may be more common if asked of the average person in the pew.

The next largest group was the 10.2% (69) who referenced larger social issues, such as patriarchy, paternalism, homophobia, and employment discrimination related to promotions and salary inequities, all of which exist outside The Episcopal Church. These respondents seemed not to want to blame the Church for being particularly problematic, but see it as simply a part of the larger society where these issues are long standing and seemingly intractable.

Another small, but notable group (6.5%; n = 44) made reference to some element of the clergy-lay divide, most (30) concerned about lay perpetrators and the inability to hold laity accountable. There

have been studies on the difficulty of people in service work holding clients accountable for their behavior for fear of losing their jobs (Good and Cooper, 2016), which applies here. Most such harassment is never reported, leaving service workers to manage the situations themselves or with close colleagues. Because many clergy work alone with few if any colleagues close by, this can be especially challenging. In addition, no clergy person wants anyone to leave the Church, but allowing misconduct to continue often serves to keep others away, who come hoping for a safe spiritual community. Still, one clergy person asked directly, “How do you report your own parishioner?” The other 14 comments focused on the more well-known problem of clergy power, and the inability for many laypeople to effectively resist. There are problems in both directions of the clergy-lay divide, although the dynamics differ – in one case, the power of the client, in the other, the power of the leader.

Critiques of various Church processes were mentioned in 5.5% (37) of the comments. The complaint process was described as “ineffective” and “humiliating”; some simply said that offenders are not held accountable at all. One noted that alleged perpetrators have been promoted or that nothing was done, so they had to leave their diocese to get away. Respondents said that the clergy don’t trust the system, partly because it is run by men. More than one noted that the effectiveness of the “system” actually depends not anything systematic, but on who one’s bishop is at the time, and some bishops were named as offenders themselves.

Finally, a few respondents noted very specific elements in misconduct that are hard to address, most referencing micro-aggressions related to gender inequality. Comments included references to “the old boys club,” men in high positions who lack adequate training, and the relatively small number of clergywomen in lead positions in larger churches. One clergywoman wrote broadly that, “We need models for men relating to women as spiritual leaders/advisor/mentors that do not default to the woman being either mommy or girlfriend.” Another expressed her frustration, saying, “I’ve been afraid to voice my concerns with colleagues because doing so draws anger and hostility. After a point, it’s exhausting.” One clergywoman noted unwanted attention related to her appearance: “I have been told I am too beautiful to be a priest. That my hair is beautiful and requests for me to wear it in a certain way. I have been called ‘spiritual eye candy.’ I have been told by someone that he would need to ‘be careful’ working with me because he had a problem with boundaries and we ‘just can’t f*** each other’.” Few, if any clergywomen in any denomination would be surprised with any of these comments. Repeating the concern quoted above: “How do you report your own parishioner?”.

This question and others inspired some to include specific suggestions for improvements – some related to policies, processes and structures, others regarding trainings, and a few miscellaneous items. These appear in Appendix B.

SUMMARY RECOMMENDATIONS

- The demographic realities of The Episcopal Church present a few challenges, the most notable related to these issues is age; the average age of church members is older than of other Americans. The issues of gender-based and sexual misconduct are not limited to any age group, but movements for social change are often pushed and sustained by younger people, and tolerance for such behavior was more common in previous decades. To depend primarily on members who are in their 50s and 60s could make progress difficult.
- More training is needed, particularly for laity, although clergy awareness of policies and procedures should also be increased, ideally to 100%. Indeed, all training efforts could be expanded. In particular though, these data found that most perpetrators are cisgender laymen; hence they should be the main target of training programs. At the same time, support structures should be developed for their most common victim/survivors – clergywomen and transgender/nonbinary clergy. If there was a single theme throughout the comments, it was that clergy do not know how to respond to harassment of themselves without alienating parishioners.
- Although past trainings received positive reviews overall, they might also be improved with updated materials. The challenge here is making sure everyone attends such a training, easier to require of clergy than laity. Because most perpetrators are laypersons, work colleagues and fellow students, it will be especially important to make sure the trainings focus not only on the typical power differentials that lead priests, supervisors and professors to offend, but also the dynamics around the harassment of service providers and peers.
- Training should pay particular attention to gender-based micro-aggressions, which are often subtle. Focus should also be not only on discrimination to cisgender women, but also to transgender and nonbinary persons, who appear to be very likely to experience misconduct in the Church. People should also be trained in tactics to respond when they witness an incident, since respondents indicated a desire to act in such situations. Knowing what to say or do ahead of time will make that more likely.
- Processes for reporting and investigation need to be reviewed to make sure they are effective so they can be trusted by those currently hesitating to make reports. Clergy and employees particularly fear that a report would be held against them, so reporters must be protected from retaliation by supervisors, in their steps toward ordination, and by bishops and others in authority. Many suggested that there be more evenness across dioceses or that complaints be handled by persons outside of the bishops' offices, even outside of the clergy structures, where people perceive there is an attempt to protect each other – an “old boys club.” Some bishops have handled cases well, while others have not.

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Continuance recommendation

Our Task Force requests that we be allowed to continue our work as a Task Force of the General Convention for the next 2 triennia, recognizing the continued challenges the current pandemic has created for the entire world. We ask that a budget of \$157,000 be allocated to our work for the next triennium. This will allow for three in-person meetings over the next triennium, consulting fees as we develop training modules, and costs associated with the beginning work for truth and reconciliation. See the summary of work for further explanation of the need for this Task Force to continue.

Supplemental Materials

Table of contents:

1. [APPENDIX A - SURVEY INSTRUMENT](#)
2. [APPENDIX B - SPECIFIC SUGGESTIONS FOR IMPROVEMENTS](#)

APPENDIX A: SURVEY INSTRUMENT

The online version of the survey below also included skip logic, programmed to move respondents to subsequent questions based on their responses to previous questions. That skip logic does not appear here.

This first section will allow us to identify patterns in the data based on demographics.

1. In what year were you born?

2. What is your gender identity?

- Female Cis (woman whose gender identity corresponds with that of her assigned sex)
- Female Transgender (woman whose gender identity differs from that of their assigned sex or those who are not exclusively masculine or feminine)
- Male Cisgender (man whose gender identity corresponds with that of his assigned sex)
- Male Transgender (man whose gender identity differs from that of their assigned sex or those who are not exclusively masculine or feminine)
- Non-Binary (one who may express their gender through a combination of masculinity and femininity or neither; aka genderqueer)

3. What is your sexual orientation (select all that apply)?

- Asexual
- Bisexual
- Gay
- Heterosexual
- Lesbian
- Pansexual
- Other (please specify): _____

4. What is your race/ethnicity? (select all that apply)

- Asian or Pacific Islander
- Black or African American
- Hispanic or Latinx
- Native American or Alaska Native
- White or Caucasian
- Other (please specify): _____

5. What is the highest educational level you have completed?

- Less than HS
- Some High School
- High School or GED
- Associate's Degree or Vocational Certificate
- Bachelor's Degree
- Graduate Degree

6. In what range is your gross annual income?

- 0 - \$25,000
- \$25,001 - \$50,000
- \$50,001 - \$75,000
- \$75,001 - \$100,000
- \$100,001 - \$150,000
- \$150,001 - \$250,000
- More than \$250,000

7. What is your role in the Episcopal Church (select all that apply)?

- Full-time Clergy
- Part-time Clergy
- Non-Stipendiary/Volunteer Clergy
- Retired Clergy
- Member of Religious Order
- Postulant/Candidate for Holy Orders
- Layperson
- Employee at a Local Church
- Employee at an Episcopal Church Institution/Agency (such as Diocesan Office, Camp/Retreat Center, College Chaplain)
- Employee at an Educational Institution
- Seminary Student
- Student in a Local Ordination Training Program

8. I am a (select all that apply):

- Bishop
- Bishop Suffragan
- Dean of Cathedral
- Rector with Clergy (Priest/Deacon) Staff
- Priest in Charge/Interim with Clergy (Priest/Deacon) staff
- Solo Rector
- Solo Priest in Charge/Interim
- Associate Rector
- Priest on Church Staff
- Priest on Non-Church Staff
- Deacon on Church Staff
- Deacon on Non-Church Staff
- Diocesan Canon/Staff
- Military Chaplain
- Hospital Chaplain
- School Chaplain
- Other (please specify): _____

9. That educational institution is

- an Episcopal Seminary
- an Episcopal College
- an Episcopal School
- a Deacon or Local Ministry Training Program

10. If you attend/serve a church, approximately how many persons attend on a regular Sunday? If a deacon/priest serving multiple churches, estimate the total for all churches.

- 1 - 49
- 50 - 149
- 150 - 349
- 350 or more
- I do not attend/serve an Episcopal Church.

11. My Episcopal Province/Diocese (broken down in more detail than appears here) is:

- I (CT, ME, MA, NH, RI, VT)
- II (Cuba, Europe, Haiti, NJ, NY, Virgin Islands)
- III (DE, MD, PA, VA, Washington DC, WV)
- IV (AL, GA, FL, KY, Eastern LA, MS, NC, SC, TN)
- V (IL, IN, MI, Eastern MO, OH, WI)
- VI (CO, IA, MN, MT, NE, ND, SD, WY)
- VII (AR, KS, NM, Western LA, Western MO, TX, OK)
- VIII (AK, AZ, CA, HI, ID, Micronesia, NV, OR, Taiwan, UT, WA)
- IX (Colombia, Dominican Republic, Ecuador, Honduras, Puerto Rico, Venezuela)
- Not sure or Does not apply

The next few questions ask about your awareness of policies and programs in The Episcopal Church.

12. Are you familiar with The Episcopal Church's sexual misconduct policies? Or that we have sexual misconduct policies?

- Yes, I know the policies fairly well.
- I don't know the exact policies, but I know that they exist.
- I'm not sure.
- No, I really don't know anything about such policies.

13a. Would you know where within The Episcopal Church to report an incident of sexual misconduct?

- Yes
- Not sure
- No

13b. Where would you report such an incident?

14. Are you aware of any Episcopal Church sponsored educational programs dealing with sexual misconduct?

- Yes
- Not sure
- No

15a. Have you ever attended such an event?

- Yes
- No

15b. What event did you attend?

15c. Did you find that event helpful?

- Very much so
- Somewhat
- Minimally
- Not at all

15d. What would have made it better?

16a. Are you aware of an Episcopal Church related agency providing services to victims of sexual misconduct?

- Yes
- Not sure
- No

16b. What agency/ies do you know about and what services to they provide?

The next section asks about your experiences with sexual or gender-based misconduct in TEC.

17a. Have you ever received any of the following types of unwanted sexual attention or gender-based aggression/discrimination in an Episcopal Church?

	Church	School	Office	Not in an EC setting
Looks and leers				
Touching or closeness				
Attempt to fondle or kiss				
Gender-based comments, teasing or jokes				

REPORTS TO THE 80th GENERAL CONVENTION

	Church	School	Office	Not in an EC setting
Pressure to engage in gender-based comments, teasing or jokes				
Sexual emails, texts or letters				
Pressure for dates or sexual activities				
Offer to influence in return for sexual favors				
Attempted sexual assault/rape				
Completed sexual assault/rape				

17b. What aspect of your identity was the focus of the misconduct (select all that apply)?

- Your gender
- Your sexual orientation
- Your race/ethnicity
- Your order
- Something else
- Not sure

17c. The unwanted behavior/s was/were initiated by (select all that apply):

	Status		Gender		
	Clergy	Lay	Female	Male	Trans/Non-Binary
Denominational Leader (Bishop, Diocesan Staff, etc.)					
Local Church Priest					
Local Church Deacon					
Other Local Church Leader					

REPORTS TO THE 80th GENERAL CONVENTION

	Status		Gender		
	Clergy	Lay	Female	Male	Trans/Non-Binary
Local Church Member					
Workplace Supervisor					
Workplace Colleague					
Workplace Client					
Seminary/Formation Program Instructor or Admin					
Field Ed Supervisor					
Seminary/Formation Program Student Colleague					
Other					

17d. Are you aware of anyone else who experienced gender-based or sexual misconduct by this/these person/s?

- Yes
- In some cases, yes, but not all
- No
- Not sure

18. Have rules ever been made in your church, school or workplace which were targeted at you, or enforced for you and not others, because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

19. Have you been treated with less courtesy/respect than other people because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

20. Have your contributions been overlooked or credited to someone else, because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

21. Have you ever been discouraged or pushed out of a position or participation in a church/program because of your sex, gender, gender identity or sexual orientation?

- Yes
- Not sure
- No

22. Have you ever experienced any of the following because of your gender/gender identity (select all that apply)?

- Mis-gendering
- Rejection/Ostracization
- Failure of people to recognize your gender identity
- Exclusion from gender-specific activities
- Restroom restrictions
- Name calling
- Violence or threats of violence
- Dead-naming (use of previous name)
- Other (briefly describe): _____
- No

23. Have you ever experienced any of the following because of your sexual orientation? (select all that apply)?[1]

- Rejection/Ostracization
- Failure to recognize your orientation as legitimate
- Failure to recognize your partner/spouse as legitimate
- Name calling
- Other (briefly describe): _____
- No

24. In what decade(s) (if at all), did you have any experiences of gender-based/sexual misconduct occur (select all that apply)?

- Before 1970
- 1970s
- 1980s
- 1990s
- 2000s
- 2010s
- I have never experienced gender-based/sexual misconduct in an Episcopal Church setting.

25. How did you respond to any unwanted behaviors (select all that apply)?

- Ignored it, went along with it, minimized it or made a joke of it
- Avoided the person
- Told the person/s to stop
- Threatened to tell others
- Told a colleague/friend/church member
- Told a supervisor
- Requested a transfer or quit
- Other (briefly describe): _____

26. How did your supervisor respond (select all that apply)?

- An investigation was done
- I was believed and supported and appropriate corrective action was taken
- My complaint was trivialized, minimized or dismissed
- I was discounted and disciplinary action was taken against me

- I was told the behavior does not meet the threshold for an investigation
- I was not believed
- Other (briefly describe): _____

27. People choose not to make a formal complaint for many good reasons. What were your reasons for not reporting to a supervisor (select all that apply)?

- I did not know the reporting process.
- I considered the behavior minor and saw no need to report it.
- I did not want to hurt the person.
- I was too embarrassed.
- I didn't think anyone would believe me.
- I didn't think anything would be done.
- I feared it would be held against me or that it would affect my future.
- I was afraid of losing income.
- I feared I would be blamed.
- I was threatened with retaliation if I reported.
- Something else (briefly describe): _____

28. Overall, what difference did your response/s make (select all that apply)?

- Overall, things got better.
- There were multiple incidents and results varied.
- Overall, things got worse.
- Little or no change.
- Things got better for me, but nothing changed in the system.
- Things got better for others, but not for me.
- I had to help myself by leaving.
- I am still in the situation.
- I have lost income.
- I am having a hard time finding a new position.
- Something else: _____

29. How did your experience/s affect you?

	Got worse	No impact	Improved	DNA
My worship attendance				
My local church involvement				
My feelings about my local church				
My attendance at work				
The quality of my work				
My feelings about my work				
My attendance at school				
The quality of my school work				
My feelings about school				
My feelings @ The Episcopal Church				
My feelings about myself				
My relationship with God				
My spiritual practices				
My physical health				
My mental health				
My emotional health				
My financial health				

30. Was there any other impact on your life?

- No
- Not sure
- Yes (briefly describe): _____

31a. Have you ever witnessed any behaviors noted in previous questions in an Episcopal Church setting?

- Yes, I have witnessed one/some.
- I have not witnessed any, but it has been reported to me by the victim.
- I have not witnessed any, but it has been reported to me by someone other than the victim.
- No, I have never witnessed any of the above behaviors.
- Not sure.

31b. What was your response to witnessing and/or being informed of this behavior (select all that apply)?

- Ignored it/Did nothing
- Spoke with the victim only
- Spoke to the perpetrator only
- Began misconduct proceedings
- Reflected on my own behaviors that may be similar
- Shared my concerns with another person (Bishop, Rector or Colleague)
- Something else (briefly describe):

31c. Given raised awareness of sexual misconduct today, what would your response be if you saw the same behavior today?

- The same
- Different (briefly describe) _____
- Not sure

32. Is there anything else you'd like to say about gender-based/sexual misconduct in The Episcopal Church, related to your own experiences, or more generally?

APPENDIX B: SPECIFIC SUGGESTIONS FOR IMPROVEMENTS

- There is no recourse against misbehavior by a **lay** church member, and that's a problem. We have to make it safer to report lay people, especially big givers; too bad lay members aren't required to take the training pre-confirmation.
- Attention must be paid to those of us who have been assaulted by **laypeople**. There needs to be action, not talk. Changes must be made in canon law church-wide to protect us. We need to be believed and taken seriously. We need the same procedures and protections that victims of clergy abuse receive. Simply telling us to go to court is neither helpful nor kind.
- It might be helpful to have **separate training programs** for men and women. For men to get really honest about their behavior, even the seemingly innocent stuff and for women to equip then better to protect themselves, recognize the early signs of grooming, and give them some real encouragement and tools to report.
- What sexual misconduct policy applies at **seminaries**? Title IX or Title IV. It is confusing and not clear to seminarians.
- I believe we need to make clear ways for **associates/assistants/curates** to make reports against rectors that protect the victim. The way our polity is set up makes it very scary to report anything against a rector because it currently seems most likely that the victim (associate/curate) will be the one who loses their job and has long-term consequences for the incident. I know so many (mostly female) associates who have experienced this behavior.
- Often, it **depends entirely on the bishop** as to whether there is support. Bishops are beholden to the parish for their paychecks, and not many, in my experience, are comfortable challenging the people who pay their salaries. Unless real, tangible, systemic change is made (more than token liturgies - in transparent misconduct proceedings that do not rely on Diocesan staff to be intake officers while unwilling to challenge their employer - or who themselves are also inappropriate in their behavior) then there will be no accountability and little ability to challenge the status quo.
- The **alcohol culture** at church meetings results in a lot of inappropriate incidents.
- **Leaflets in the bulletins** with training announcements would be great.
- I wish we could have **mandatory misconduct training that has more teeth**. The reporting **process should be the same in every diocese**, and **victims should be able to see the final copy of their own reports**. It is too sensitive an event for it to be simply transcribed by someone who wasn't there, after an interview, with no review by the victim to insure it is accurate.

- One thing I would love to see is the Canon to the Ordinary or appointee check in after 6 months or a year to see how you are doing and see if there is anything to do to help. After a priest does something like this, the Canon is the front line of the church. I would have appreciated more **communication** regarding the progress and ending of the investigation that stemmed from my incident.
- Information about our Title IV processes is still very spotty depending upon the diocese. People still suffer needlessly. There does not appear to be a way to **make sure that our Bishops do their own due diligence** in relationship to our Canons.
- Our current canons, which only have mechanisms that are very punitive, still leave room for a **lot of conduct to go unchecked. There is a lot of conduct that shouldn't raise to the level of "removal from ministry" that should be addressable.** We should also have better mechanisms for holding lay people to account/inviting change.
- Publish **new materials**. Make it online on YouTube, and broadly available. Make it super easy for anyone to learn. Make vignettes. 7 min video about one topic. You will need 20 videos not one or two.
- My only major advice is to do a huge **overhaul of safeguarding**. As someone who experienced sexual assault NOT in the Episcopal Church as a youth, I think the program is poorly done and triggering. Programs should also be available to offer guidance to anyone going through safeguarding who may need additional support afterwards. While I was fine mentally after the sessions, a peer in my cohort left the program obviously distraught. It was obvious that it had an impact on several people within the class, and I think the training could be done with more tact.
- I would like to see churches **post salaries** for open positions (clergy and lay) and stick to them, rather than allowing "room for negotiation" (which always penalizes female and POC candidates), and somewhere to turn when a Title IV complaint quietly fizzles because the priest in question is a friend of the bishop.
- A **simple, clear outline** of applicable offenses and reporting procedures would be helpful.

TASK FORCE TO ASSIST THE OFFICE OF PASTORAL DEVELOPMENT

Membership

Canon Jill Mathis, <i>Chair</i>	Pennsylvania, III	2021
The Rt. Rev. Audrey Scanlan, <i>Vice-Chair</i>	Central Pennsylvania, III	2021
Mr. Robert Ambrogi, <i>Secretary</i>	New Hampshire, I	2021
Canon Lynn Bates	Vermont, I	2021
The Rev. Canon Joseph Chambers	Texas, VII	2021
The Rev. Percy Grant	Ohio, V	2021
Prof. Lawrence Hitt, II	Colorado, VI	2021
The Rt. Rev. Mark Hollingsworth	Ohio, V	2021
The Rev. Canon Gregory Jacobs	Newark, II	2021
The Rt. Rev. Chilton Knudsen	Maryland, III	2021
The Rt. Rev. Brian Seage	Mississippi, IV	2021
The Rev. Canon Nora Smith	New York, II	2021
The Very Rev. Dr. Steven Thomason	Olympia, VIII	2021
Ms. Mary T. Yeiser	Lexington, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Canon Rafael Zorilla, 2018

Acknowledgements

Alexandra (Sasha) Killewald, PhD., Professor of Sociology, Harvard University

Mandate

Resolutions 2018-A147 & 2018-A189

2018-A147 Pilot Board for Episcopal Transitions

Resolved, That a Task Force to assist the Office of Pastoral Development be appointed for an initial period of three years commencing at the adjournment of the 79th General Convention; and be it further

Resolved, That the Task Force be composed of up to twelve persons appointed jointly by the Presiding Bishop and President of the House of Deputies in consultation with the Bishop for Pastoral Development. Membership of the Task Force will represent the diversity of all the baptized within the Church and will consider particular gifts and experiences that will be beneficial to the work of the Task Force; and be it further

Resolved, That the Task Force will concentrate its work on assisting the Office of Pastoral Development in:

revising existing resources and creating new resources to assist dioceses in the discernment, nomination, search, election, and transition processes for episcopal transitions;

making available through open-source and digital networks, the variety of materials for use by individuals, dioceses, and consultants in the discernment, nomination, search, election and transition processes for episcopal elections;

establishing a process and developing resources by which individuals may seek support in discerning a possible call to the episcopate;

gathering and analyzing data regarding diversity in episcopal transitions, developing processes and resources to encourage diversity in the episcopate;

recruiting, training and evaluating Transition Consultants and missional review consultants;

encouraging electing dioceses to contract for the services of a Transition Consultant throughout the episcopal search and election process;

formalizing and expanding recruitment and training for Transition Consultants;

standardizing and monitoring the contracts used by Transition Consultants with electing dioceses;

establishing a process to review the performance of each Transition Consultant, including the use of individual performance records for each Transition Consultant and to provide for their collection and analysis.

establishing a process for electing dioceses to provide individual performance evaluations based upon objective standards for the Transition Consultant(s) who served the electing diocese from which the work of each Transition Consultant can be evaluated.

providing ways in which one or more Transition Consultants can participate in the maintenance of the Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition and evaluation of the effectiveness of the episcopal election process.

enhancing guidelines for reference, background, medical, and psychological screening of persons considered for nomination for episcopal elections and guidelines for the dissemination, evaluation, and record keeping of the screening information gathered; and be it further

Resolved, That the Bishop for Pastoral Development report semi-annually to the Executive Council and to the next General Convention; and be it further

Resolved, That the amount of \$250,000 be appropriated for the organization and initial resources of the Task Force, to include two meetings per year.

2018-A189 Create Task Force to Develop Process for Substance Abuse Screening

Resolved, the House of Deputies concurring, That a Task Force or similar body be formed to develop a standardized process of screening persons applying for ordination with respect to their history of and experience with alcohol and substance abuse; and be it further

Resolved, that the Task Force identify best practices for dioceses to follow in evaluating issues of alcohol and substance abuse, including training for Standing Committees, Commissions on Ministry and others involved in the ordination process, as well as training for persons in the ordination process; and be it further

Resolved, That the Task Force prepare a report for the 80th General Convention giving recommendations with respect to alcohol and substance abuse for (1) screening processes for dioceses to employ in the ordination process, including how to best evaluate applicants with a history of addictions who are now living in recovery (2) training for Standing Committees, Commissions on Ministry and others involved in the ordination process, including diocesan staff, and (3) training and other appropriate recommendations for persons in the ordination process; and be it further

Resolved, That the Task Force be composed of three Bishops appointed by the Presiding Bishop, at least two of whom have experience in dealing with clergy with a history of alcohol or substance abuse, and six priests, deacons or lay persons appointed by the President of the House of Deputies, at least 3 of whom have relevant experience in the evaluation and treatment of persons with a history of alcohol or substance abuse and at least one of whom serves as a diocesan Transition Officer who has experience in dealing with clergy who have a history of alcohol or substance abuse. At least three members of this Task Force should be persons living in recovery; and be it further

Resolved, That the Task Force also examine a process for identifying other forms of addiction and their potential impact on ministry; and be it further

Resolved, That the General Convention request the Joint Standing Commission on Program, Budget and Finance allocate \$25,000 to the budget to facilitate the work of the Task Force.

Summary of Work

THEOLOGICAL AND ECCLESIASTICAL CONTEXT

The principal challenge in providing denominational support to dioceses in episcopal transitions may well be one of polity. While the wider church both has experience and wisdom to offer and has a substantial stake in the outcome, the responsibility for determining and carrying out the process, and ultimately making the choice of bishop, falls to the diocese in transition. Achieving a companionship between diocese and wider church that accommodates the autonomy of the former, the reasonable expectations of the latter, and the accountability of both, is essential to the health and vitality of the church. The burden of attending to that relationship falls predominantly on the Office of Pastoral Development and the person who leads it, the Bishop for the Office of Pastoral Development.

The Office of Pastoral Development additionally oversees the implementation of disciplinary canons and processes when bishops are respondents in Title IV proceedings. As with episcopal transitions, this involves guiding both bishops and the dioceses they serve along often complex and inevitably painful paths to resolution and, the church hopes, recovery. The relationships between and among complainants, respondents, parishes, dioceses, the denomination itself, and the wider community all fall within the church's vocation to provide pastoral attention, as well as accountability, care, and healing, wherever possible.

Finally, the Presiding Bishop's responsibility to provide pastoral care to bishops, their spouses, and their families is supported in large part by the Office of Pastoral Development.

Healthy episcopal ministry is the goal and responsibility of all in the church, the ordained and laity alike. The structures by which an episcopal vocation is discerned, identified, supported, and held accountable must likewise involve the whole body of Christ. The Office of Pastoral Development plays an important role in inviting, encouraging, and supporting that corporate responsibility.

In understanding the collaborative dynamic intended by our theology and ecclesiology, it may be helpful to distinguish between authority and responsibility. Our polity, how we agree to organize and govern ourselves as a body, presupposes that baptismal authority is the only human authority in the church, and that all members, by virtue of their baptism, are recipients thereof in equal amount. No one has either more or less authority as a result of elected position, holy orders, gender, race, orientation, or any other defining attribute (save age, until turning 16). As the baptized, we are each equally endowed with authority.

By processes defined in the general canon, diocesan canons, and parochial by-laws, we invest some of our baptismal authority in one another for specific duties by electing vestry members and wardens; delegates and deputies to diocesan and general conventions, respectively; committee and

commission members in congregations, dioceses, and the wider church; and by ordaining deacons, priests, and bishops. And in the mystery of God, the baptismal authority we invest in one another is received not as authority, but as responsibility. It is received not as power over, but as accountability for.

In this way, we all engage in a continuing dynamic of surrendering some of our individual authority to others, and taking on specific responsibility for and to the whole. This is for us, as Christians and Episcopalians, a spiritual discipline of letting go of self-will and taking on responsibility for the body of Christ. It serves as calisthenics for surrendering ourselves to God and making Jesus's way our way.

The Task Force to Assist the Office of Pastoral Development has been charged with exploring, understanding, and articulating the scope of episcopal transitions, elections, and service. It has endeavored to provide practical resources for dioceses in transition and individuals discerning a vocation to the episcopate. As well, it has undertaken to investigate potential vehicles for assisting the Bishop for the Office of Pastoral Development in the challenging pastoral and disciplinary responsibilities of that Office. Our work follows upon that of previous interim bodies, most notably the Task Force on the Episcopacy and the Commission on Impairment and Leadership.

The efficacy and fidelity of our common life as Christians and Episcopalians is dependent upon trust – our trust of one another and our trust in God. It is clear to this Task Force that trust is foundational to the effective discernment and identification of leaders in the church, lay and ordained, and to the ministries that we expect of them. While that trust cannot be legislated, it can be anticipated by canon, inspired by practice, and supported by the structures and best practices of our church. Ultimately, its practical realization is relational, dependent always on interactions between individuals and defined groups, Christians who are open to the gifts one another brings and willing both to invest authority in each other and to receive responsibility in return.

It is that trust and interdependence we have sought in the structures and resources we have explored and developed in our work as a task force and which we recognize as essential to raising up and sustaining faithful and vibrant leadership in the church.

-Bishop Mark Hollingsworth

SUMMARY OF WORK

Because of the work described in the final bullet point of 2018-A147, “enhancing guidelines for reference, background, medical, and psychological screening, etc...”, it was determined that the work of this Task Force would also include Resolution 2018-A189 Create Task Force to Develop Process for Substance Abuse Screening. In addition, the work mandated by the fourth bullet point, suggested that this Task Force should also concern itself with addressing 2018-A138 Transmission of Demographic Data from Episcopal Elections and 2018-A145 Urging Adoption of Local Canons Relating to Episcopal Elections.

During our first meeting, in November of 2018, it was determined that the role of this Task Force would be to work with the Bishop of the Office of Pastoral Development, the Rt. Rev. Todd Ousley, to help identify areas that need improvement and revision, either directly, or by pointing to outside expertise. The goal would be to condense and update materials (i.e., the current Manual for Episcopal Elections was last updated in 2012) to make them more accessible to the Church and easier to ‘digest’ and to allow recommended best practices to be ‘customizable’ to the needs of each diocese in a bishop search, and to develop a web-based portal so that search materials would be accessible to a broader range of users.

We determined that the work specified by the bullet points in 2018-A147, and the whole of resolutions 2018-A189 and 2018-A138 as well as 2018-A145 and 2018-A146 would best be addressed by breaking them up among working groups. Working with the Bishop Ousley of the Office of Pastoral Development we prioritized our work as follows:

- Best Practices Database: updated and condensed
- Recruit, train and re-tool transition consultants and their materials
- Enhance guidelines for reference checking, medical and psychological resources
- Develop a web portal that is accessible to the diocesan leaders

BEST PRACTICES DATABASE UPDATED AND CONDENSED

The episcopal search consultants utilized by most dioceses holding elections for bishops have, over the years, collected many documents relating to all aspects of an episcopal search and election. These documents are in an electronic database and are in need of review, organization, culling, and updating.

During the course of the triennium a work group reviewed approximately 600 documents in the online database. Each member of the group reviewed approximately 150 documents and identified documents which were particularly valuable, somewhat helpful, duplicative or no longer reflected “best practices.”

The multiple resources in the database were indexed as best as possible. The work group concluded that search consultants also needed to be involved to move this particular task further along, and so this work will continue. Bishop Ousley is identifying consultants to work with the group, but the pandemic presented logistical challenges and work with the consultants remains to be done.

The goal is to make the best of the materials available publicly to search and nominating committees as well as Standing Committees involved in episcopal searches.

RECRUIT, TRAIN AND RE-TOOL TRANSITION CONSULTANTS AND THEIR MATERIALS

In response to the issues identified in Resolution 2018-A147 concerning the recruiting, selection, training, and evaluation of “Transition Consultants and mission review consultants,” a work group of the Task Force held a series of interviews and conversations with the Bishop Ousley of the Office of Pastoral Development as well as present and past transition consultants experienced in episcopal elections. The focus of our work was to initially gain an understanding as well as some insights into the present consulting process and then formulate a series of recommendations for future implementation by the Office of Pastoral Development. It should be noted that our recommendations were shared with the Bishop for the Office of Pastoral Development and received his full endorsement with the expectation that many of them will be implemented before the end of this triennium.

Findings

- The current process for identifying, selecting and training consultants in episcopal elections has been in place without significant modification for more than 10 years.
- The Bishop for the Office of Pastoral Development, largely alone, identifies, recruits, selects, assigns, trains and monitors the work of the episcopal search consultants.
- Potential consultants are routinely identified largely by self-selection/expression of interest or recommendation by others. Many were formerly diocesan transition staff or had similar experience as parish search consultants. There are currently between 8-10 active search consultants.
- There is no formal application process for consultants, nor does a specific job description exist for consultants.
- Periodic training of consultants is typically conducted by the Bishop for the Office of Pastoral Development and one or two experienced consultants. No regular schedule for formal training of consultants or continuing education appears to have been followed. The last comprehensive training was held in 2016.

- Present consultants are convened by teleconference on a quarterly basis by one of the consultants for 90-minute sessions. Topics generally include exploring common problems/challenges and sharing best practices/search materials.
- Principal training materials include “The Raising Up of Episcopal Leadership: A Manual for Dioceses in Transition” (2007, last revised 2012) and accumulated search materials created by consultants, presently located in common online database accessible to consultants. Many of these materials are considerably out of date and must be reviewed, revised, and supplemented by relevant and user-friendly search resources.
- There is no common process or materials for evaluating the work of consultants. Some have created an evaluation form to be completed by the episcopal search committee.
- There is no present systematic evaluation of search consultants by the Office of Pastoral Development, nor a process for mandatory recertification of consultants.

We conclude that there should be a commitment and strategy by the Office of Pastoral Development to reset, reimagine, and repurpose the episcopal search consultant process in order to effectively address certain deficiencies in the present program.

Recommendations

Identification, Recruitment, and Selection of Consultants

- The task of identifying, recruiting, selecting, training, monitoring and evaluating episcopal search consultants is critical to the integrity and effectiveness of the episcopal transition process. Standing Committees, bishop search/transition committees, current diocesan bishops and staff, and bishop applicants themselves must be assured that well-qualified and purposely trained consultants are being made available to them through the Office of Pastoral Development. To that end, we recommend that the Office of Pastoral Development set a goal of selecting, training and certifying a pool of at least 15 qualified consultants by no later than the conclusion of this triennium (i.e., July 2021).
- As the work of recruiting, selecting, training and evaluating prospective consultants would benefit from the gifts and experience of persons with particular knowledge, objectivity and insight in these areas, a council of advice should be created to assist the Bishop for the Office of Pastoral Development in carrying out these responsibilities.
- The council should consist of no more than 5 persons with collective expertise in human resources/organizational management, law, church polity, leadership discernment, transition ministry, and family systems/behavioral psychology. Clergy (bishop, priest, deacon), chancellor, and laypersons should be represented on the Council, with the goal of actively advising the Bishop for the Office of Pastoral Development at all stages (initially and

ongoing) in the re-imagining and implementation of a new recruiting, application, interview and selection process for consultants.

- In the interest of establishing an open, uniform, and unbiased process that will yield well-qualified applicants of suitable expertise and temperament, we recommend that all prospective consultants must engage in a formal application, interview and vetting process regardless of their current or former status as episcopal search consultants.
- Special attention should be given to the creation of a search consultant job description that speaks to the expertise, gifts, temperament and character, as well as the specific requirements of the position. A suggested job description may be found in the supplemental materials at the end of this report (JOB DESCRIPTION FOR EPISCOPAL SEARCH CONSULTANTS).
- We also encourage the Office of Pastoral Development to enlist and engage the services of persons and organizations that can assist in the identification and recruitment of persons in traditionally and presently underrepresented groups.
- In the course of its work, the council must also give consideration to the creation of standards and requirements for the certification and recertification of consultants. Input from consultant trainers would be beneficial to this process.

Training of Search Consultants

- In order to address issues concerning the content, adequacy, and frequency of training, the Office of Pastoral Development should give serious consideration to the creation of a consultant curriculum design and training advisory team.
- This team consisting of 5 or 6 persons would be tasked, in conversation with the Bishop for the Office of Pastoral Development, with the creation and implementation of a formal training curriculum for the search consultants. Members of the team should have collective demonstrated experience and knowledge in family systems, church polity, theology, consulting processes, coaching/mentoring dynamics, curriculum and design/implementation, consultant training, and evaluation of consultants.
- The team would be tasked with creating an initial training curriculum envisioned for a 3-day training session for consultants, to be conducted by the Bishop for the Office of Pastoral Development and trainers from the advisory team. The team would also take responsibility for designing training modules for future periodic training of consultants as well as the design of a process for ongoing evaluation of the effectiveness and requirements for consultant training, including the recertification of consultants.

- To underscore the significance and importance of consultant training, we recommend that some modest amount of the initial and continuing training expense be borne by the consultant-trainees themselves.
- Recognizing the necessity for providing consultants with the opportunity to meet collaboratively for purposes of mutual support, sharing resources, and identifying best practices, the quarterly meetings of consultants should be continued. We encourage the Bishop for the Office of Pastoral Development, members of the Council of Advice, and members of the curriculum/training team to participate in these sessions when appropriate.
- Our conversations have also informed us of the need for annual continuing education/training as well as creating a process for recertifying current consultants. We suggest an initial certification for consultants of no longer than 3 years with appropriate expectations/requirements for periodic continuing education and participation in quarterly consultants' meetings.

Evaluation of Episcopal Search Consultants

First let it be said that the reason for evaluation of the consultants is as an educational and coaching part of this overall process. Evaluation will identify what to emphasize in trainings, as well as the gifts and strengths that this consultant can share with the group. Evaluation gives voice to the participants and guidance to the ongoing process. An evaluation will be performed for each transition with appropriate feedback shared with the consultant.

For the most complete evaluation, it is important for people at the many different points of contact during the episcopal search process with which the consultant works to provide input. Thus, the President of the Standing Committee, Diocesan Bishop, Chair of the Search Committee, Applicants, Chair of the Transition Committee and the Bishop-Elect should be considered primary contacts during the evaluation process. Each of these persons should be invited to complete an evaluation at the conclusion the search process in which they were involved, in order to provide a fresh perspective on the consultant's work.

Given the number of participants likely to be involved, a 360 method of evaluation would offer the most comprehensive and fairest process. In a 360-evaluation process, both the consultant and the participants complete the same evaluation form. This allows the consultant to receive feedback from a number of sources, allowing for comparison with the consultant's own self-evaluation. The 360-evaluation model would offer the opportunity for the consultant to see him/herself as others see the consultant, providing guidance and insight from the experiences of participants in the search process.

At the completion of the consultation, each of the collected 360 evaluations would be collated by the Office of Pastoral Development. The consultant evaluations would be read by the Bishop of Pastoral Development as well as a member of the Bishop for the Office of Pastoral Development's

council of advice, and either an active or retired consultant, as well as the search consultant. At this point, reflection, education and coaching can take place in a way that should become normative to the system.

Recommendations for Future Work

- Identify a Pool of Certified Search Consultants. Recommend that the Office of Pastoral Development set a goal of selecting, training and certifying a pool of at least 15 qualified consultants by no later than the conclusion of this triennium.
- Council of Advice. A Council of Advice should be created to assist the Bishop for Pastoral Development in work of recruiting, selecting, training and evaluating prospective consultants. The Council of Advice with the advice and consent of the Presiding Bishop, should consist of no more than 5 persons with collective expertise in human resources/organizational management, law, church polity, leadership discernment, transition ministry, and family systems/behavioral psychology. Clergy (bishop, priest, deacon), chancellor, and laypersons should be represented on the Council, with the goal of actively advising the Bishop for Pastoral Development at all stages (initially and ongoing) in the re-imagining and implementation of a new recruiting, application, interview and selection process for consultants.
- Establish a formal application and review process for search consultants. In the interest of establishing an open, uniform, and unbiased process that will yield well-qualified candidates of suitable expertise and temperament, we recommend that all prospective consultants must engage in a formal application, interview and vetting process regardless of their current or former status as episcopal search consultants.
- Create Search Consultant Job Description. Special attention should be given to the creation of a search consultant job description that speaks to the expertise, gifts, temperament and character, as well as the specific requirements of the position as suggested by the job description found in the supplemental materials.
- Create Standards for Search Consultant Certification and Recertification.
- In the course of its work, the Council of Advice must also give consideration to the creation of standards and requirements for the certification and recertification of consultants.
- Identify a Consultant Curriculum Design and Training Advisory Team to address issues concerning the content, adequacy, and frequency of training. This team consisting of 5 or 6 persons would be tasked, in conversation with the Bishop for Pastoral Development, with the creation and implementation of a formal training curriculum for the search consultants.
- Create Search Consultant Evaluation Process to evaluate performance and effectiveness of the search consultant's work following a bishop search and election.

DEVELOP TRAINING RESOURCES FOR STANDING COMMITTEES, COMMISSIONS ON MINISTRY, AND BISHOPS RE: ISSUES OF IMPAIRMENT

A work group of the Task Force undertook to develop trainings materials regarding issues of impairment. This was accomplished after researching best practices from around the Church and in related areas. A list of Core Competencies was created along with a resource guide written by the Rev. Canon Nancy Van Dyke Platt, the Rev. Dr. David Moss, III and Elizabeth Platt Hamblin entitled *Addiction: Interview Questions for Ordination Aspirants*. The aforementioned resources provide basic understanding for clergy and lay leadership involved in discernment at all levels.

These Competencies may be found in the supplemental materials at the end of this report (CORE COMPETENCIES FOR CLERGY AND PASTORAL MINISTERS ADDRESSING ALCOHOL AND DRUG DEPENDENCE AND OTHER ADDICTIVE BEHAVIORS). They are presented as a specific guide to the core knowledge, skills and preconceptions which are essential to the ability of all diocesan transition leaders to exercise their responsibilities with regard to persons with substance use disorder and any other addictive behavior.

ENHANCE GUIDELINES FOR REFERENCE CHECKING, MEDICAL AND PSYCHOLOGICAL RESOURCES, ETC. FOR EPISCOPAL ELECTIONS

A work group spent considerable time focused on the last bullet point of 2018-A147:

"... enhancing guidelines for reference, background, medical, and psychological screening of persons considered for nomination for episcopal elections and guidelines for the dissemination, evaluation, and record keeping of the screening information gathered."

It specifically focused on screening performed during episcopal transitions. Although neither the work group nor the Task Force as a whole addressed it, the practices described in this section could be edited down to be appropriate for screening of candidates for the diaconal or priestly clerical orders as mandated in 2018-A189.

There is no recognized best practice or consistent approach across the Church in episcopal search processes regarding what information is gathered about potential nominees, who sees it, how it is evaluated, and how decisions are made about it.

The purpose of gathering any type of information during an episcopal election process is several fold. The primary purpose is to aid various groups in discerning who should, and who should not, be considered as potential nominees for bishop at various stages of the process. The primary purpose is to identify those persons who best fit the profile the diocese has developed as to what sort of person, gifts, and skills are needed in that diocese at that time. Another purpose is to determine if there are persons who, for a variety of reasons, should not be considered as potential nominees.

The Task Force proposes Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*, which states, in part:

(c) Prior to any person's name being placed in nomination for election as a Bishop in a diocese, whether by the nominating body or by petition, floor nomination or in any other way, the diocese shall have:

(1) conducted a thorough background check of each nominee according to criteria established by the Standing Committee. Such background check to include but not be limited to criminal records, credit checks, reference checks, sex offender registry checks, verification of education, employment and ordination and review of all complaints, charges and allegations while an ordained person;

...

All such background checks and evaluations shall be conducted specifically for the election being conducted and not for any prior election or other process or purpose.

STEPS IN THE DISCERNMENT PROCESS REGARDING BACKGROUND SCREENING AND EVALUATIONS

Listed below are the typical steps involved in gathering and making decisions about and with information about applicants in episcopal searches.

- Obtain all the information you want to know about him/her to aid in the discernment process by first asking the applicant.
 - That does not mean that all information is gathered in the same way or by the same persons/means or reviewed by the same people.
- Verify important information that you have obtained from the applicant with the original source (educational institution, Recorder of Ordinations, public records, etc.).
 - This can be a tedious and potentially expensive part of the process and the purpose is often not understood and decisions about how much information to verify are often not consciously made.
- Obtain information that cannot be obtained directly from applicant, generally from experts.
 - This is where medical, psychological, substance abuse and behavioral evaluations fit. While some information (self-reported and verified information) from the applicant is provided to the evaluators, it is the opinions and findings of the evaluators that become new information to add to the growing body of information about the applicant.
- Evaluate the gathered information.
 - Depending on the type of information gathered (medical, criminal, credit, psychological, behavioral, etc.), it is often difficult to know who is most qualified to evaluate and/or interpret or explain the information to the decision-makers.
- Make decisions about the applicant in light of the gathered information.

- In episcopal election processes it is not always clear who has or should have access to the gathered information and whatever evaluations have been done by experts of that information. Similarly, it is not always clear who has the authority to make decisions about the applicant based on the gathered information and evaluations.
- Retain the records of this process for potential future use or reference.
 - There are significant differences of opinion in the Church about what information about applicants or the Bishop-elect should be kept and by whom.

In Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*, the Task Force sets out what information should be retained, about whom, and where:

(d) ... After the consecration and ordination of the bishop elected President of the Standing Committee or nominating body under Canon III.11.1(b)(1) shall promptly deliver to The Archives of The Episcopal Church a copy of all the reports of all background checks, medical, psychological and substance, chemical, and alcohol use and abuse and other addictive patterns evaluations obtained during the process for permanent retention. The President of the Standing Committee or nominating body under Canon III.11.1(b)(1) shall destroy all other copies of the reports provided to, or created within, the electing diocese other than one copy for the permanent records of the diocese.

Set forth in supplemental materials to the report is a description of the information gathering process that the Task Force recommends be followed for each applicant that is in the semi-final stage of determining who will be nominated. It includes a list of the important subject areas that information should be gathered about. (INFORMATION GATHERING PROCESS ABOUT APPLICANTS IN EPISCOPAL SEARCH PROCESSES)

Also found in the supplemental materials is the recommended process for the discernment retreat and thereafter regarding background screening and the various evaluations. (THE SCREENING PROCESS- THE DISCERNMENT RETREAT AND BEYOND)

NEED FOR EXPANDED PSYCHOLOGICAL AND ADDICTIVE BEHAVIORS SCREENING

The Task Force was given responsibility for Resolution 2018-A189 since a Task Force focused just on substance abuse was not created.

Resolved, That the Task Force prepare a report for the 80th General Convention giving recommendations with respect to alcohol and substance abuse for (1) screening processes for dioceses to employ in the ordination process, including how to best evaluate applicants with a history of addictions who are now living in recovery (2) training for Standing Committees, Commissions on Ministry and others involved in the ordination process, including diocesan staff, and (3) training and other appropriate recommendations for persons in the ordination process; and be it further

Since the Task Force's principal focus is to assist the Office of Pastoral Development, the same group that worked on other aspects of screening for episcopal elections looked at the resolve from 2018-A189 and the issue of expanding the psychological evaluation for bishops-elect and nominees for bishop. The group investigated the typical processes used for the psychological evaluation of applicants in episcopal search processes as well as the current protocol for the evaluation of Bishops-elect conducted by the Presiding Bishop through the Office of Pastoral Development. The Task Force is proposing amendments to the Canons that would expand the long-standing requirements for psychological and psychiatric evaluation for those seeking ordination to the diaconate and priesthood, priests and deacons being received from other churches as well as nominees for Bishops, Bishops-elect and Bishops from other Provinces of the Anglican Communion who will serve as Assistant Bishops in this Church to include evaluation of:

"... substance, chemical and alcohol use and abuse and other addictive patterns"

These proposals are contained in Resolution A083, *Amend Various Canons Regarding Screening Prior to Ordination or Reception*, for the diaconate, priesthood, reception, and Bishops-elect and and for nominees for Bishop and Assistant Bishops in Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*.

The Task Force believes that there would be significant benefits to making the psychological evaluation more rigorous, utilizing regional centers of excellence experienced in evaluation professionals, having a more uniform approach to these examinations, and requiring, by canon, that they be completed prior to any person being placed in nomination for election as bishop of a diocese.

The areas for psychological evaluation as well as additional recommendations about the psychological evaluation process may be found in the supplemental materials at the end of this report. (PSYCHOLOGICAL EVALUATION)

The typical schedule and content of a rigorous psychological evaluation process may also be found in the supplemental materials. (PSYCHOLOGICAL SCREENING EXAMINATION DETAILS)

PRACTICES FOR GATHERING AND SHARING INFORMATION GATHERED IN EPISCOPAL SEARCH PROCESSES

One of the big issues in the episcopal search processes in the Church is who should see and/or have access to various information gathered during the search and nomination process. Currently, there is nothing in the church wide canons about this issue: not what information should be gathered, who should have access to it during the process and whether and/or where such information should be retained. The church-wide canons are clear that it is the diocese that carries out whatever discernment process it chooses to use to select nominees for election as bishop to serve in that diocese. There is no canonical role for any other body or office in the Church until after a bishop is elected.

However, as we all know, over the past 30 years or so the Office of Pastoral Development of the Presiding Bishop has been very involved in providing advice, expertise, and assistance in episcopal election processes. In part, this has been done because post-election, by canon, the Bishop-elect must undergo a medical and psychological examination using forms and processes and an examiner chosen by the Presiding Bishop. The Office of Pastoral Development has routinely received information about the medical and psychological evaluations, if any, performed on applicants for bishop prior to election and has routinely received information on criminal records and credit history of applicants and/or bishops-elect.

At times, it has not been clear under what authority such information has been provided to the Office of Pastoral Development and/or to what extent the Office of Pastoral Development has made or recommended whether or not an applicant or bishop-elect should continue in a process. Normatively, the Office of Pastoral Development consults with subject matter experts about information of concern and makes the experts available to the search and/or Standing Committee.

The Task Force recommends that the Bishop of the Office of Pastoral Development have express/explicit authorization:

- to clarify that it is within the scope of Office of Pastoral Development’s authority to share information that he/she becomes aware of regarding a potential nominee and to engage the potential nominee and the appropriate diocesan structure (such as search committee, Standing Committee, Bishop Diocesan); and
- to consult experts regarding the information and situation and share the experts and/or their thoughts with the appropriate diocesan structure.

Many in the Church are reluctant to have search committees and/or Standing Committees directly receive and/or evaluate information from pre-election medical and psychological evaluations and background screening such as criminal records and credit histories, often out of concern for the applicant’s privacy and a concern that the information would not remain confidential (despite there being no actual right of confidentiality once the applicant signs a release document).

The Task Force recommends the practices set out in the supplemental materials at the end of this report for handling information obtained from background screening and the various evaluations obtained in episcopal search processes. (HANDLING OF INFORMATION YIELDED BY PSYCHOLOGICAL EVALUATION AND OTHER SCREENING)

The Task Force recommends the following process and procedure for the gathering of information relevant to the episcopal search and election process:

- At the beginning of the search process, every applicant signs a release and waiver forms expressly giving search committees, Standing Committees, the Office of Pastoral Development and others with a “need to know” the right to see all information gathered about an applicant including, but not limited to public records, medical evaluations,

psychological evaluations, behavioral health evaluations, and substance abuse evaluations as well as granting all of those persons the right to consult with evaluators and experts.

- Additional persons who might be included in the non-specified but “need to know” category would include:
 - Chancellor of electing diocese
 - Chancellor to the Presiding Bishop
 - Bishop of electing diocese
 - Bishop of diocese in which applicant is canonically resident
 - Bishop of diocese in which applicant is licensed and serving

The routine practice would be as follows:

- All background screening information including public records checks and complete medical/psychological/behavioral/substance abuse evaluations provided to the Chair of the search committee of the electing diocese and Office of Pastoral Development simultaneously.
- If there is any negative or questionable information whatsoever, the background screening information and records or evaluations, in full, are shared with the entire search committee.
- If after providing the information to the search committee the search committee recommends the applicant to the Standing Committee as a potential nominee, the background screening information and records or evaluations, in full, are provided to the entire Standing Committee.
- Depending on the seriousness of the information of concern, the Standing Committee discloses the information to the electing convention well in advance of the election.
- Nothing in the above listing is meant to preclude or prohibit additional consultations at any and all steps in the process with those deemed by President of the Standing Committee, the Chair of the search committee, the Office of Pastoral Development, the search committee as a whole, or Standing Committee as a whole to be helpful to the discernment process.
- Similarly, nothing in the above listing is meant to preclude or prohibit informing or consulting with the applicant about the information of concern.

The Task Force proposes that some of these steps be added to the Canons in Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*, specifically as follows:

... (d) Reports of all background checks, medical, psychological and substance, chemical or alcohol use and abuse evaluations shall be initially provided simultaneously to the Standing Committee

President of the electing diocese or nominating body under Canon III.11.1(b)(1) and to the Presiding Bishop. ...

RESOLUTIONS REGARDING BACKGROUND SCREENING AND MEDICAL, PSYCHOLOGICAL AND OTHER EVALUATIONS IN EPISCOPAL ELECTIONS

As mentioned previously, the canons do not require any background screening, or medical, psychological or other evaluations of nominees for bishop prior to the election. It is only post-election that the Bishop-elect must undergo a medical and psychiatric and psychological evaluation under Canon III.11.3(a)(2). In contrast, background screening and psychological evaluation are required before ordination to be a Deacon, before ordination to be a Priest (if more than 36 months have passed since the screening and evaluation for ordination to the diaconate), of Priests and Deacons being received into The Episcopal Church from other Provinces of the Anglican Communion and other denominations, and of Bishops of other Provinces of the Anglican Communion who will serve as Assistant Bishops in this Church.

It is a nearly universal practice, however, that background screening is conducted by nearly all electing dioceses before a person is actually included as a nominee on the slate. Many electing dioceses have also adopted the practice of requiring medical evaluations and psychological and/or psychiatric evaluation before a person is actually included as a nominee on the slate for bishop.

Also, many dioceses in both their processes leading to ordination to the diaconate and priesthood and in their episcopal election processes require evaluations of substance use and abuse and other addictive behaviors.

In order to both bring consistency to the treatment of the various ordination, reception, and election processes, to recognize the necessity and importance of nominees for bishop having background screens and thorough evaluations, and to update the best practice for evaluations to include substance abuse and other addictive behaviors, the Task Force proposes Resolution A079, *Amend Canon III.11.1 regarding Screening of Nominees for Episcopal Elections*, to accomplish these critical steps in the discernment process for bishops.

In addition, the Task Force, with the approval and consent of the Church Pension Fund, proposes Resolution A082, *Amend Various Canons Regarding Preparation of Medical and Psychological Evaluation in the Ordination, Episcopal Election, and Reception Processes*. If adopted, the canonical amendments would move the responsibility for preparing the forms for the medical, psychological and/or psychiatric evaluations in the ordination, reception and election processes from the Church Pension Group to a church wide body in recognition of the realities of the changing role and expertise of the Church Pension Fund and the expanded purposes for such evaluations. The Resolution also provides that it is the work of the whole Church, and not just an agency of the Church, with the participation of all orders of ministry as well as experts, to develop the forms. The Resolution is written to provide that it will be a new Standing Commission on Ministry and Formation

being proposed by the Standing Commission on Structure, Governance and Constitution and Canons that will have responsibility for this important task. If the General Convention chooses not to create this Standing Commission, the Resolution provides that either a Task Force or a subcommittee of the Standing Commission on Structure, Governance and Constitution and Canons have that responsibility.

DEVELOP PROCESSES AND RESOURCES TO ENCOURAGE DIVERSITY IN THE EPISCOPATE

We acknowledge that the portion of Resolution 2018-A147 which calls for gathering and analyzing data on episcopal elections, and the portion of Resolution 2018-A138 which calls for engaging experts to analyze said data regarding elections and report to the Executive Council and, triennially, to the General Convention, was not possible to accomplish this triennium. The dearth of data available would render analysis difficult, and points to the need for the development of an instrument and process by which information is gathered. In working with Dr. Sasha Killewald, PhD., Professor of Sociology at Harvard University, it was determined that more time needs to be spent creating an investigative questionnaire for data collection, a mechanism for collecting it, and a repository for this data. Analysis of this data will require the use of a trained professional. Once we have done this front-end work, we may engage in a meaningful analysis and learn what we may want to put in place to increase and encourage diversity in the episcopal search and election process. Some of the things we are curious about are :

- What was the tipping point that lead to the election of more women?
- How does the diversity of the slate reflect the diocese?
- Of the women and people of color elected, who participated in a cohort group?
- Have the search committees done anti-bias training?
- Have there been non-traditional search processes that have led to more diverse slates?

This is work that we will want to continue into the next triennium and will require the design of mechanisms by which to collect and analyze information.

The Task Force re-affirms the recommendation that Section III (Diversity) of the Blue Book Report of the Task Force on the Episcopacy (2018) be provided to dioceses at the beginning of their search process along with such other information with respect to diversity as the Office of Pastoral Development, assisted by the Task Force to Assist the Office of Pastoral Development, may deem appropriate, all such information to be updated at least triennially. This too is work that should continue into the next triennium along with specific actions from Resolution 2018-A145 to:

- Encourage a diverse applicant pool and follow a search and election process that reduces the likelihood of discrimination based on the criteria contained in Canon III.1.2

- Ensure that the process is transparent throughout the entire search and election process.
- Provide accountability for all involved in the search and election process.
- Require, prior to nomination, the collection of pertinent data on applicants being considered for nomination using the most current means available for background checks, financial information, and interviews of all bishops and transition officers having knowledge of a person being considered for nomination.

RESOURCES TO ENCOURAGE A DIVERSE APPLICANT POOL

Since the call to form this task force (2018) the church has enjoyed a significant increase in the diversity of those elected to the office of bishop. Statistics from the past two decades, attached as supplemental material to this report, reveal a trend towards the greater inclusion of women, greater numbers of bishops of color, and a greater number of bishops identifying as LGBTQI. This trend is encouraging and signals a shifting in the hearts of the people in the electing bodies of the church to reflect more clearly the values of the Episcopal Church and the Jesus Movement that recognize all of God’s children as worthy, that we respect the dignity of every human being (BCP pg. 305), and that barriers of gender, race, or sexual expression should not be stumbling blocks as we seek leaders for the church. (BISHOP CONSECRATIONS BY GENDER SINCE 2000)

The increased diversity within the House of Bishops could not have been accomplished without the good work of the many people who contributed in so many ways; by the creation of discernment cohorts and conferences, individual coaches, and the creation of the online toolkit known as “Cast Wide the Net”. This toolkit sought to bring awareness to the continuing gender gaps in church leadership and compensation. Its purpose was to provide search committees, and individuals seeking professional development, with ideas and best practices for lessening these gender inequalities. “Cast Wide the Net” focuses particularly on women in the search and transition process and is still an important resource for fostering diversity in the presbytery, and undoubtedly aided in making the current episcopal election trends possible. Since 2018, 50% of the people elected to the episcopate have been women.

Discerning, Learning, Leading, and Living a Call to the Episcopate

In 2019-20, several bishops and spouses were invited to contribute short videos on the particular questions such as, “how did you discern your call?”, “what have you learned since you became a bishop (or your spouse has become a bishop?)”, “what has been your leadership style?”, and finally, “what’s the life of a bishop (and their spouse) like?”. Because the pandemic changed our plans to have these videos professionally recorded, they have been created informally and, as of this writing, are planned to be posted on the TEC website as "Discerning Holy Orders". Their purpose is so that anyone who might be curious about a call to the episcopate could explore, in an accessible way, some of their own questions before embarking on a formal discernment process. As we noted, the

work of cohort groups and coaches has contributed to the increased diversity in those seeking a call to the episcopate, and the Task Force believes that this additional resource of the church might permit someone who has not had access to either cohort or coaches begin to explore their own questions about a call to the episcopate.

The work on Resolution 2018-A145's several mandates has helped to identify the need for a more accessible way to learn about and discern about the episcopate. For many, access to opportunities to engage in conversation with peers and church leaders about one's own sense of call to the episcopate have been too limited. We believe the entire church will be well served by being able to have available resources to de-mystify the call, the process, and the reality of living into the episcopate. To that end, the Task Force pursued a course of action to update and expand the materials offered through "Cast Wide the Net" and to develop a new website, "Diversity in Holy Orders", which will house not only this resource, but other resources, some still in process, calling for work in the next triennium.

Budget

The Task Force to Assist the Office of Pastoral Development is planning to have at least one (1) in person meeting in 2021. Additionally, we hope to begin the process of recruitment, training and evaluation of search consultants, a necessary component of our work. The costs related to meetings, travel, meals, and trainers require the balance of our funding. We have a balance of \$89,000 and request authorization for such expenses.

Proposed resolutions

A079 Amend Canon III.11.1 regarding Screening of Nominees for Episcopal Elections

Resolved, The House of _____ concurring, That Canon III.11.1 is hereby amended by adding new subsections c and d and renumbering the remaining subsections as follows:

III.11.1

Sec. 1

a. Discernment of vocation to be a Bishop occurs through a process of election in accordance with the rules prescribed by the Convention of the Diocese and pursuant to the provisions of the Constitution and Canons of this Church. With respect to the election of a Bishop Suffragan, the Diocese shall establish a nominating process either by Canon or by the adoption of rules and procedure for the election of the Bishop Suffragan at a regular or special Diocesan Convention with sufficient time preceding the election of the Bishop Suffragan.

b. In lieu of electing a Bishop, the Convention of a Diocese may request that an election be made on its behalf by the House of Bishops of the Province of which the Diocese is a part, subject to confirmation by the Provincial Synod, or it may request that an election be made on its behalf by the House of Bishops of The Episcopal Church.

1. If either option in Sec. 1.b is chosen, a special Joint Nominating Committee shall be appointed unless the Diocesan Convention has otherwise provided for the nominating process. The Committee shall be composed of three persons from the Diocese, appointed by its Standing Committee, and three members of the electoral body, appointed by the President of that body. The Joint Nominating Committee shall elect its own officers and shall nominate three persons whose names it shall communicate to the Presiding Officer of the electoral body. The Presiding Officer shall communicate the names of the nominees to the electoral body at least three weeks before the election when the names shall be formally placed in nomination. Opportunity shall be given for nominations from the floor or by petition, in either case with provision for adequate background checks.

2. If either option in Sec. 1.b is chosen, the evidence of the election shall be a certificate signed by the Presiding Officer of the electoral body and by its Secretary, with a testimonial signed by a constitutional majority of the body, in the form required in Canon III.11.3, which shall be sent to the Standing Committee of the Diocese on whose behalf the election was held. The Standing Committee shall thereupon proceed as set forth in Canon III.11.3.

c. *Prior to any person's name being placed in nomination for election as a Bishop in a diocese, whether by the nominating body or by petition, floor nomination or in any other way, the diocese shall have:*

1. conducted a thorough background check of each nominee according to criteria established by the Standing Committee. Such background check to include but not be limited to criminal records, credit checks, reference checks, sex offender registry checks, verification of education, employment and ordination and review of all complaints, charges and allegations while an ordained person;
2. each nominee evaluated by a licensed medical doctor approved by the Standing Committee;
3. each nominee evaluated by a licensed psychologist approved by the Standing Committee, with psychiatric referral if desired or necessary;
4. each nominee evaluated for substance, chemical and alcohol use and abuse and other addictive patterns whether as part of the medical examination, psychological examination or otherwise by professionals approved by the Standing Committee;

All such background checks and evaluations shall be conducted specifically for the election being conducted and not for any prior election or other process or purpose.

d. Reports of all background checks, medical, psychological and substance, chemical or alcohol use and abuse evaluations shall be initially provided simultaneously to the Standing Committee President of the electing diocese or nominating body under Canon III.11.1.b.1 and to the Presiding Bishop. After the consecration and ordination of the bishop elected President of the Standing Committee or nominating body under Canon III.11.1.b.1 shall promptly deliver to The Archives of The Episcopal Church a copy of all the reports of all background checks, medical, psychological and substance, chemical, and alcohol use and abuse and other addictive patterns evaluations obtained during the process for permanent retention. The President of the Standing Committee or nominating body under Canon III.11.1.b.1 shall destroy all other copies of the reports provided to, or created within, the electing diocese other than one copy for the permanent records of the diocese.

~~c.~~ **e.** The Secretary of the body electing a Bishop Diocesan, Bishop Coadjutor, or Bishop Suffragan, shall inform the Presiding Bishop promptly of the name of the person elected. It shall be the duty of the Bishop-elect to notify the Presiding Bishop of acceptance or declination of the election, at the same time as the Bishop-elect notifies the electing Diocese.

~~d.~~ **f.** No Diocese shall elect a Bishop within thirty days before a meeting of the General Convention.

EXPLANATION

This Resolution has several purposes. One is to bring a degree of consistency to the discernment screening and evaluations that are conducted for those in discernment (or reception) processes to become a Priest or Deacon and those used when a Bishop is elected. Currently, background screening and medical, psychological, and psychiatric evaluations are conducted prior to ordination or reception from another denomination or Province of the Anglican Communion for Priests, Deacons, and Bishops of other Provinces of the Anglican Communion who will serve as Assistant Bishops. Currently the canons do not require any background screening or evaluations prior to the

election of a Bishop for a Diocese. It is only after an election that the Bishop-elect must have medical, psychological, and psychiatric evaluations, even though the recommended process and wide-spread practice is to conduct background screening and medical, psychological, and psychiatric evaluations on all those who are nominated. This Resolution would make that best practice a requirement.

Another purpose is to broaden the current medical, psychological, and psychiatric evaluations in Bishop discernment processes to include chemical, and alcohol use and abuse and other addictive patterns evaluations. Experience has shown that such issues are not necessarily identified in routine medical, psychological, and psychiatric evaluations, and that failure can lead to serious consequences for the electing Diocese and for the Bishop and his/her family.

Another purpose is to address the issue of who should initially receive the results of the background screening and evaluations. Presently, the canons are silent and there is no generally agreed upon best practice. This lack has led to confusion and some misunderstandings on who the information belongs to and who should review it and make decisions about it. Since it is the electing Diocese that is having the screening and evaluations done and it is the electing Diocese that has to make the discernment of who is appropriate and fit to serve as its Bishop, and it is the electing Diocese that will incur most of the consequences of any problems or issues with the new Bishop, the electing Diocese needs to have all the information from the screening and evaluations to assist it in its discernment. The Resolution aims to balance the interests of the electing Diocese having the information it needs for its discernment process with the interest that a nominee has in sensitive information being handled and shared appropriately with the Presiding Bishop's interest in the overall health and fitness of persons who will serve as Bishops. The proposed canon does not prohibit the sharing of information beyond the President of the Standing Committee and the best practice would have the President consult with the Presiding Bishop (through the Office of Pastoral Development), and perhaps Chancellors, subject matter experts, and the nominee prior to further sharing of the information.

And, the Resolution provides for the appropriate destruction of the evaluations and background screening information and also for the appropriate retention of the information for the person elected Bishop only in case the information becomes relevant in the future.

A080 Amend Canon III.11.3 and 4 reducing time for Consents to Bishop Elections from 120 to 90 days

Resolved, The House of _____ concurring, That Canon III.11.3 be amended as follows:

Canon III.11.3

Sec. 3

a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.

(Date) _____

(Signed) _____

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent *to be submitted to the Presiding Bishop within not more than ninety days*. Each Standing Committee, in not more than ~~one hundred and twenty~~ ninety days after the sending by the electing body of the certificate of the election, shall respond by sending the

Standing Committee of the Diocese for which the Bishop is elected either the testimonial of consent in the form set out in paragraph (b) of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop receives sufficient statements to indicate a majority of ~~those~~ *the Bishops exercising jurisdiction* consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

b. Evidence of the consent of each Standing Committee shall be a testimonial in the following words, signed by a majority of all the members of the Committee:

We, being a majority of all the members of the Standing Committee of _____, and having been duly convened, fully sensible how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Order. In witness whereof, we have hereunto set our hands this _____ day of _____ in the year of our Lord _____.

(Signed) _____

c. Testimonials required of the Standing Committee by this Title must be signed by a majority of the whole Committee, at a meeting duly convened, except that testimonials may be executed in counterparts, any of which may be delivered by facsimile or other electronic transmission, each of which shall be deemed an original.

And be it further.

Resolved, that Canon III.11.4 be amended as follows:

Sec. 4. In case a majority of all the Standing Committee of the Dioceses do not consent to the ordination of the Bishop-elect within ~~one hundred and twenty~~ *ninety* days from the date of the notification of the election by the Standing Committee of the Diocese for which the Bishop was elected, or in case a majority of all the Bishops exercising jurisdiction do not consent within ~~one hundred and twenty~~ *ninety* days from the date of notification to them by the Presiding Bishop of the election, the Presiding Bishop shall declare the election null and void and shall give notice to the Standing Committee of the Diocese for which the Bishop was elected and to the Bishop-elect. The Convention of the Diocese may then proceed to a new election.

EXPLANATION

The time between the election of a bishop for a diocese and the ordination of the Bishop-elect needs to be long enough to obtain the necessary consents from a majority of bishops with jurisdiction and Standing Committees, long enough to allow for the ending of whatever role the Bishop-elect currently holds, long enough for the Bishop-elect and family to relocate, if necessary, and long enough to make the necessary preparations for the ordination and celebration. However, if that period is too long, the Bishop-elect and family, the people in the place the Bishop-elect currently serves, the electing diocese and the departing Bishop and family are in a state of limbo where no one can move forward to whatever is next. A balancing of these concerns is needed to determine the right amount of time.

The world and its use of technology has changed significantly since 1901 when the Church set the time within which consents to the elections of bishops must be in at three months for bishops and six months for Standing Committees. In 1994 the time for consents of both bishops and Standing Committees was changed to four months (and to 120 days in 1997). Gathering the consents and required certifications prior to the ordination of a Bishop-elect is the responsibility of the Presiding Bishop and the Standing Committee of the electing Diocese, and is facilitated by the General Convention Office. Beginning in 2019 bishops have been able to provide their consents online through a software module developed by the General Convention Office. Currently, the consents from bishops are actually received in roughly sixty days (two months). As of August 2019 Standing Committees can submit information on consents electronically, thus eliminating the need to provide for submitting consents by mail or delivery service from across the United States and from the other countries in which dioceses are located. The Task Force recommends that The reason to not shorten the time period for Standing Committees to less than ninety days (three months) is that some Standing Committees do not meet every month, especially during the summer months.

The Task Force believes that with the ability to provide consents electronically reducing the time within which bishops with jurisdiction and Standing Committees must provide their consents from 120 days (four months) to ninety-days (three months) will allow sufficient time for bishops and Standing Committees while reducing the time that everyone is in limbo.

A081 Amend Canon III.11.1.a regarding Standing Committee's Role in Episcopal Elections

Resolved, The House of _____ concurring, That Canon III.11.1 be amended as follows:

Canon III.11

Sec. 1

a. Discernment of vocation to be a Bishop *Diocesan, Coadjutor, or Suffragan* occurs through a process of election in accordance with ~~the rules prescribed by the Convention of the Diocese and pursuant to the provisions of the Constitutions and Canons of this Church and the electing Diocese and any special rules adopted by the Convention of that Diocese.~~ *Unless otherwise provided in the electing Diocese's Constitution or Canons, the Standing Committee shall have oversight of, and responsibility for, any search, nomination, transition, and election processes.* ~~With respect to the election of a Bishop Suffragan, the~~ *The Diocese shall establish a nominating process either by Canon or by the adoption of rules and procedures for the election of the Bishop Suffragan at a regular or special meeting of the Diocesan Convention of the Diocese with sufficient time preceding the election of the Bishop Suffragan.*

b. In lieu of electing a Bishop, the Convention of a Diocese may request that an election be made on its behalf by the House of Bishops of the Province of which the Diocese is a part, subject to confirmation by the

Provincial Synod, or it may request that an election be made on its behalf by the House of Bishops of The Episcopal Church.

1. If either option in Sec. 1.b is chosen, a special Joint Nominating Committee shall be appointed unless the Diocesan Convention has otherwise provided for the nominating process. The Committee shall be composed of three persons from the Diocese, appointed by its Standing Committee, and three members of the electoral body, appointed by the President of that body. The Joint Nominating Committee shall elect its own officers and shall nominate three persons whose names it shall communicate to the Presiding Officer of the electoral body. The Presiding Officer shall communicate the names of the nominees to the electoral body at least three weeks before the election when the names shall be formally placed in nomination. Opportunity shall be given for nominations from the floor or by petition, in either case with provision for adequate background checks.

2. If either option in Sec. 1.b is chosen, the evidence of the election shall be a certificate signed by the Presiding Officer of the electoral body and by its Secretary, with a testimonial signed by a constitutional majority of the body, in the form required in Canon III.11.3, which shall be sent to the Standing Committee of the Diocese on whose behalf the election was held. The Standing Committee shall thereupon proceed as set forth in Canon III.11.3.

c. The Secretary of the body electing a Bishop Diocesan, Bishop Coadjutor, or Bishop Suffragan, shall inform the Presiding Bishop promptly of the name of the person elected. It shall be the duty of the Bishop-elect to notify the Presiding Bishop of acceptance or declination of the election, at the same time as the Bishop-elect notifies the electing Diocese.

d. No Diocese shall elect a Bishop within thirty days before a meeting of the General Convention.

EXPLANATION

It is generally understood across the Church that when a diocese is going to elect a bishop, the Standing Committee of the electing diocese is responsible for the process, subject to the church wide Constitution and Canons and the Constitution and Canons and any rules adopted by the Convention of the electing diocese. This amendment would simply state the general understanding of who has the responsibility for the overall process while still explicitly allowing a diocese to put some other body in charge of part or all of the process by specifying that in its constitution or canons.

A082 Amend Various Canons Regarding Preparation of Medical and Psychological Evaluation in the Ordination, Episcopal Election, and Reception Processes

Resolved, The House of _____ concurring, That forms prescribed by the Canons to be used in medical and psychological evaluations of persons prior to their ordination as deacon, priest, and bishop, or of persons already ordained in another church prior to their reception into this Church, require revision and updating; and be it further

Resolved, That the 80th General Convention agrees with the Church Pension Fund that as the purposes and needs of the forms have changed over time, a more appropriate group should be named to prepare forms that meet all the needs of the Church; and be it further

Resolved, That in developing the forms described in Canons III.6.5.j.2, III.8.5.k.2, III.10.1.b, and III.11.3.a.2, the Standing Commission on Ministry and Formation (or the committee of the Standing Commission on Structure, Governance, Constitution and Canons; or the task force specially designated by the General Convention) shall consult with (i) at least two experts in the field of medicine; (ii) at least two experts in the field of psychology; (iii) persons of all orders knowledgeable about and involved in diocesan ordination processes, such as persons serving on Commissions on Ministry or other discernment bodies, Standing Committees, bishops, and other persons serving in other discernment-related roles; and for forms designed for persons being evaluated as bishops, bishops-elect or nominees for bishop (iv) the Office of Pastoral Development; and be it further

Resolved, That if a Standing Commission on Ministry and Formation is created that Canons III.6.5.j,2, III.8.5.k.2, III.10.1.b, and III.11.3.a.2 be amended as follows:

Canon III.6.5.j

Sec. 5. Preparation for Ordination

j. Within thirty-six months prior to ordination as a Deacon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention* and if desired or necessary, psychiatric referral.

Canon III.8.5.k.2

Sec. 5. Preparation for Ordination

a. The Bishop and the Commission shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Priesthood and to ensure that pastoral guidance is provided throughout the period of preparation.

b. If the Postulant or Candidate has not previously obtained a baccalaureate degree, the Commission, Bishop, and Postulant or Candidate shall design a program of such additional academic work as may be necessary to prepare the Postulant or Candidate to undertake a program of theological education.

c. Formation shall take into account the local culture and each Postulant or Candidate's background, age, occupation, and ministry.

d. Prior education and learning from life experience may be considered as part of the formation required for the Priesthood.

e. Whenever possible, formation for the Priesthood shall take place in community, including other persons in preparation for the Priesthood, or others preparing for ministry.

f. Formation shall include theological training, practical experience, emotional development, and spiritual formation.

g. Subject areas for study during this program of preparation shall include:

1. The Holy Scriptures.
2. History of the Christian Church.
3. Christian Theology.
4. Christian Ethics and Moral Theology.

5. Christian Worship according to the use of the Book of Common Prayer, the Hymnal, and authorized supplemental texts.

6. The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, and the historical and contemporary experience of racial and minority groups.

h. Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.

2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.

3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.

4. the Church's teaching on racism.

i. Each Postulant or Candidate for ordination to the Priesthood shall communicate with the Bishop in person or by letter, four times a year, in the Ember Weeks, reflecting on the Candidate's academic experience and personal and spiritual development.

j. The seminary or other formation program shall provide for, monitor, and report on the academic performance and personal qualifications of the Postulant or Candidate for ordination. These reports will be made upon request of the Bishop and Commission, but at least once per year.

k. Within thirty-six months prior to ordination as a Deacon under this Canon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.

2. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention*, and if desired or necessary, psychiatric referral.

l. Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.

Canon III.10.1.b

Sec. 1. Prior to reception or ordination, the following must be provided

b. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by ~~The Church Pension Fund~~, *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention* and if desired or necessary, psychiatric referral. ~~If the medical examination, psychological examination, or~~

~~background check have taken place more than thirty six months prior to reception or ordination they must be updated.~~ All such background checks and evaluations shall be conducted specifically for the ordination or reception under this Canon and not for any other process or purpose.

Canon III.11.3.a.2

Sec. 3

a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention* shall be used for this purpose; and
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.

(Date) _____

(Signed) _____

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent. Each Standing Committee, in not more than one hundred and twenty days after the sending by the electing body of the certificate of the election, shall respond by sending the Standing Committee of the Diocese for which the Bishop is elected either the testimonial

of consent in the form set out in paragraph (b) of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop receives sufficient statements to indicate a majority of those Bishops consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

And be it further;

Resolved, That if a Standing Commission on Ministry and Formation is NOT created that Canons III.6.5.j.2, III.8.5.k.2, III.10.1.b, and III.11.3.a.2 be amended as follows:

Canon III.6.5.j

Sec. 5. Preparation for Ordination

j. Within thirty-six months prior to ordination as a Deacon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, *a committee of the Standing Commission on Structure, Governance, Constitution and Canons or a task force assigned by the General Convention, in accordance with principles and directions adopted by the General Convention*, and if desired or necessary, psychiatric referral.

Canon III.10.1.b

Sec. 1. Prior to reception or ordination, the following must be provided

b. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by ~~The Church Pension Fund~~, *a committee of the Standing Commission on Structure, Governance, Constitution and Canons or a task force assigned by the General Convention, in accordance with principles and directions adopted by the General Convention*, and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.

Canon III.11.3.a.2

Sec. 3

a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding

Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund, *a committee of the Standing Commission on Structure, Governance, Constitution and Canons or a task force assigned by the General Convention, in accordance with principles and directions adopted by the General Convention*; and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.

(Date) _____

(Signed) _____

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent. Each Standing Committee, in not more than one hundred and twenty days after the sending by the electing body of the certificate of the election, shall respond by sending the Standing Committee of the Diocese for which the Bishop is elected either the testimonial of consent in the form set out in paragraph b. of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop

receives sufficient statements to indicate a majority of those Bishops consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

EXPLANATION

The Episcopal Church Canons require medical and psychological evaluations prior to ordination for deacons (Canon III.6.5.j.2), priests (Canon III.8.5.k.2), and bishops (Canon III.11.3.a.2), as well as for persons ordained in other churches being received into The Episcopal Church (Canon III.10.1.b). Each of these Canons prescribes that those evaluations be undertaken using forms prepared by The Church Pension Fund (CPG).

There has been a need for some time for an updating of these forms. As it began the process for this update, CPG recognized that these new forms would best be prepared by a group with a mandate more aligned with the needs of today's Church, a point with which we agree. The purposes served by the forms have indeed evolved over the years. CPG originally got involved with this task in the early 20th Century when it noticed an inordinate number of relatively newly-ordained clergy taking long-term disability. As the Church's primary benefits provider, CPG had an interest in guarding against that, as did the Church. Later, as its Church Insurance entities also became a provider of liability insurance to much of the Church, CPG gained an additional interest, in guarding against potential liability. The Church shares that interest, as well. As important as those two concerns are, however, the Church's interests in the medical and psychological screening of persons in the ordination, bishop discernment and reception processes are much broader, including a range of topics that explore fitness for ministry.

Accordingly, the Task Force proposes that the Canons be amended to provide that the preparation of forms be undertaken either by a newly-created Standing Commission on Ministry and Formation, the creation of which is being proposed by the Standing Commission on Structure, Governance, Constitution and Canons; or, if such a Standing Commission is not created, by a committee of Standing Commission on Structure, Governance, Constitution and Canons unless a task force is created by the General Convention especially for that purpose. Further, we propose that whichever body undertakes the task, it be charged with consulting with medical and psychological professionals as well as persons with a variety of roles in the discernment process. We have confirmed with the Chief Executive Officer of the Church Pension Fund that it is agreeable to having another body of the Church responsible for the preparation of these forms.

A083 Amend Various Canons Regarding Screening Prior to Ordination or Reception

Resolved, The House of _____ concurring, That Canon III.6.5.j.2 be amended to read as follows:

III.6

Sec. 5. Preparation for Ordination

- a. The Bishop and the Commission shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Diaconate in accordance with this Canon to ensure that pastoral guidance is provided throughout the period of preparation.
- b. The Bishop may assign the Postulant or Candidate to any congregation of the Diocese or other community of faith after consultation with the Member of the Clergy or other leader exercising oversight.
- c. Formation shall take into account the local culture and each Postulant or Candidate's background, age, occupation, and ministry.
- d. Prior education and learning from life experience may be considered as part of the formation required for ordination.
- e. Wherever possible, formation for the Diaconate shall take place in community, including other persons in preparation for the Diaconate, or others preparing for ministry.
- f. Before ordination each Candidate shall be prepared in and demonstrate basic competence in five general areas:
 - 1. Academic studies including, The Holy Scriptures, theology, and the tradition of the Church.
 - 2. Diakonia and the diaconate.
 - 3. Human awareness and understanding.
 - 4. Spiritual development and discipline.
 - 5. Practical training and experience.
- g. Preparation for ordination shall include training regarding
 - 1. prevention of sexual misconduct against both children and adults.
 - 2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
 - 3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
 - 4. the Church's teaching on racism.

h. Each Candidate for ordination to the Diaconate shall communicate with the Bishop in person or by letter, four times a year, in the Ember Weeks, reflecting on the Candidate's academic, diaconal, human, spiritual, and practical development.

i. During Candidacy each Candidate's progress shall be evaluated from time to time, and there shall be a written report of the evaluation by those authorized by the Commission to be in charge of the evaluation program. Upon certification by those in charge of the Candidate's program of preparation that the Candidate has successfully completed preparation and is ready for ordination, a final written assessment of readiness for ordination to the Diaconate shall be prepared as determined by the Bishop in consultation with the Commission. This report shall include a recommendation from the Commission regarding the readiness of the Candidate for ordination. Records shall be kept of all evaluations, assessments, and the recommendation, and shall be made available to the Standing Committee.

j. Within thirty-six months prior to ordination as a Deacon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral.

k. Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.

and be it further;

Resolved, that Canon III.8.5.k.2 be amended as follows:

III.8

Sec. 5. Preparation for Ordination

a. The Bishop and the Commission shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Priesthood and to ensure that pastoral guidance is provided throughout the period of preparation.

b. If the Postulant or Candidate has not previously obtained a baccalaureate degree, the Commission, Bishop, and Postulant or Candidate shall design a program of such additional academic work as may be necessary to prepare the Postulant or Candidate to undertake a program of theological education.

c. Formation shall take into account the local culture and each Postulant or Candidate's background, age, occupation, and ministry.

- d.** Prior education and learning from life experience may be considered as part of the formation required for the Priesthood.
- e.** Whenever possible, formation for the Priesthood shall take place in community, including other persons in preparation for the Priesthood, or others preparing for ministry.
- f.** Formation shall include theological training, practical experience, emotional development, and spiritual formation.
- g.** Subject areas for study during this program of preparation shall include:
 - 1. The Holy Scriptures.
 - 2. History of the Christian Church.
 - 3. Christian Theology.
 - 4. Christian Ethics and Moral Theology.
 - 5. Christian Worship according to the use of the Book of Common Prayer, the Hymnal, and authorized supplemental texts.
 - 6. The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, and the historical and contemporary experience of racial and minority groups.
- h.** Preparation for ordination shall include training regarding
 - 1. prevention of sexual misconduct against both children and adults.
 - 2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
 - 3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.
 - 4. the Church's teaching on racism.
- i.** Each Postulant or Candidate for ordination to the Priesthood shall communicate with the Bishop in person or by letter, four times a year, in the Ember Weeks, reflecting on the Candidate's academic experience and personal and spiritual development.
- j.** The seminary or other formation program shall provide for, monitor, and report on the academic performance and personal qualifications of the Postulant or Candidate for ordination. These reports will be made upon request of the Bishop and Commission, but at least once per year.

k. Within thirty-six months prior to ordination as a Deacon under this Canon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral.

l. Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.

and be it further;

Resolved, that Canon III.8.7.a.3 be amended as follows:

III.8.

Sec. 7. Ordination to the Priesthood

a. A person may be ordained Priest:

1. after at least six months since ordination as a Deacon under this Canon and eighteen months from the time of acceptance of nomination by the Nominee as provided in III.8.2.b, and
2. upon attainment of at least twenty-four years of age, and
3. if the medical evaluation, psychological evaluation, *substance, chemical and alcohol use and abuse and other addictive patterns evaluation*, and background check have taken place or been updated within thirty-six months prior to ordination as a Priest.

b. The Bishop shall obtain in writing and provide to the Standing Committee:

1. an application from the Deacon requesting ordination as a Priest, including the Deacon's dates of admission to Postulancy and Candidacy and ordination as a Deacon under this Canon,
2. a letter of support from the Deacon's congregation or other community of faith, signed by at least two-thirds of the Vestry and the Member of the Clergy or other leader exercising oversight,
3. evidence of admission to Postulancy and Candidacy, including dates of admission, and ordination to the Diaconate,
4. a certificate from the seminary or other program of preparation, written at the completion of the program of preparation, showing the Deacon's scholastic record in the subjects required by the Canons, and giving an evaluation with recommendation as to the Deacon's other personal qualifications for ordination together with a recommendation regarding ordination to the Priesthood, and

5. a statement from the Commission attesting to the successful completion of the program of formation designed during Postulancy under Canon III.8.5, and proficiency in the required areas of study, and recommending the Deacon for ordination to the Priesthood.

c. On the receipt of such certificates, the Standing Committee, a majority of all the members consenting, shall certify that the canonical requirements for ordination to the Priesthood have been met and there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination, by a testimonial addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee.

To the Right Reverend , Bishop of We, the Standing Committee of , having been duly convened at , do testify that A.B., desiring to be ordained to the Priesthood, has presented to us the certificates as required by the Canons indicating A.B.'s preparedness for ordination to the Priesthood have been met; and we certify that all canonical requirements for ordination to the Priesthood have been met, and we find no sufficient objection to ordination. Therefore, we recommend A.B. for ordination. In witness whereof, we have hereunto set our hands this day of , in the year of our Lord.

(Signed) _____

d. The testimonial having been presented to the Bishop, and there being no sufficient objection on medical, psychological, moral, or spiritual grounds, the Bishop may ordain the Deacon to the Priesthood; and at the time of ordination the Deacon shall subscribe publicly and make, in the presence of the Bishop, the declaration required in Article VIII of the Constitution.

e. No Deacon shall be ordained to the Priesthood until having been appointed to serve in a Parochial Cure within the jurisdiction of this Church, or as a Missionary under the Ecclesiastical Authority of a Diocese, or as an officer of a Missionary Society recognized by the General Convention, or as a Chaplain of the Armed Services of the United States, or as a Chaplain in a recognized hospital or other welfare institution, or as a Chaplain or instructor in a school, college, or other seminary, or with other opportunity for the exercise of the office of Priest within the Church judged appropriate by the Bishop.

f. A person ordained to the Diaconate under Canon III.6 who subsequently expresses a call to the Priesthood shall apply to the Bishop Diocesan and the Commission on Ministry. The Commission on Ministry and Bishop Diocesan shall ensure that the Deacon meets the formational requirements set forth in III.8.5.g and shall recommend such additional steps as may be necessary and required. Upon completion of these requirements and those required for Postulancy and Candidacy as set forth in Canon III.8, the Deacon may be ordained to the Priesthood.

and be it further;

Resolved, that Canon III.10.1.b be amended as follows:

III.10

Sec. 1. Prior to reception or ordination, the following must be provided

- a. a background check, according to criteria established by the Bishop and Standing Committee, and
- b. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.
- c. evidence of training regarding
 - 1. prevention of sexual misconduct.
 - 2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
 - 3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
 - 4. training regarding the Church's teaching on racism.
- d. Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.
- e. Prior to reception or ordination each clergy person shall be assigned a mentor Priest by the Bishop in consultation with the Commission on Ministry. The mentor and clergy person shall meet regularly to provide the clergy person an opportunity for guidance, information, and a sustained dialogue about ministry in The Episcopal Church.

and be if further;

Resolved, that Canon III.11.3.a.2 be amended as follows:

III.11.

Sec. 3

- a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological, ~~and~~ *psychiatric and substance, chemical and alcohol use and abuse and other addictive patterns* conditions and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.

(Date) _____

(Signed) _____

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent. Each Standing Committee, in not more than one hundred and twenty days after the sending by the electing body of the certificate of the election, shall respond by sending the Standing Committee of the Diocese for which the Bishop is elected either the testimonial of consent in the form set out in paragraph (b) of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop receives sufficient statements to indicate a majority of those Bishops consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

b. Evidence of the consent of each Standing Committee shall be a testimonial in the following words, signed by a majority of all the members of the Committee:

We, being a majority of all the members of the Standing Committee of , and having been duly convened, fully sensible how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Order. In witness whereof, we have hereunto set our hands this day of in the year of our Lord .

(Signed) _____

c. Testimonials required of the Standing Committee by this Title must be signed by a majority of the whole Committee, at a meeting duly convened, except that testimonials may be executed in counterparts, any of which may be delivered by facsimile or other electronic transmission, each of which shall be deemed an original.

EXPLANATION

This Resolution has several purposes. One is to bring a degree of consistency to the discernment screening and evaluations that are conducted for those in discernment (or reception) processes to become a Priest or Deacon and those used when a Bishop is elected. The Task Force to Assist the Office of Pastoral Development is proposing an amendment to Canon III.11.1(a) in a Resolution titled *Amend Canon III.11.1 regarding Screening of Nominees for Episcopal Elections* to require screening and evaluations of all persons who are nominees for Bishop prior to election. In that Resolution the Task Force proposes to expand the medical, psychological, and psychiatric evaluations to include chemical, and alcohol use and abuse and other addictive patterns evaluations. This Resolution would make the scope of evaluations for those in discernment or reception processes for Priest, Deacon, and Bishop the same.

In addition, this Resolution would result in more rigorous and relevant information being gathered as part of the discernment processes. Experience has shown that issues of chemical, and alcohol use and abuse and other addictive patterns are not necessarily identified in routine medical, psychological, and psychiatric evaluations, and that failure can lead to serious consequences for the congregations and Dioceses in which clergy serve.

Continuance recommendation

We recommend a continuance of the work of the task force. The shape and form of the membership may change, i.e., Council of Advice and/or Task Force but it is our earnest request for more time to complete the work. Some of the work may be on going, for example updating the resource manual for dioceses. We used the term "in real time" in our report but, 2020 has brought us to defining ministry in "covid time" or a future time not yet know to us. Given this reality, there is a great deal of work for us to accomplish during the next triennium.

Another one of our mandates was offering virtual resources on the TEC website to help equip those who are discerning a call to the Episcopate. One of our working groups very effectively prepared the resources (videos), but they are not in a polished form due to constraints regarding staffing during the COVID-19 crisis.

We also need to provide more data on diversity in the Election process and how/why dioceses are successful when they have a diverse pool of candidates.

For the next triennium we request \$150,000.

1. This includes at least two in-person meetings, travel and accommodations.
2. We need to engage a consultant for data gathering.
3. Training and evaluating search consultants, providing accommodations for in-person trainings.

We are grateful for being entrusted with the opportunity to serve God's people.

Supplemental Materials

1. [Bishop Consecrations](#)
2. [Job Description for Episcopal Search Consultants](#)
3. [Core Competencies for Clergy and Pastoral Ministers Addressing Alcohol and Drug Dependence and Other Addictive Behaviors](#)
4. [Information Gathering Process About Applicants in Episcopal Search Processes](#)
5. [The Screening Process - The Discernment Retreat and Beyond](#)
6. [Psychological Evaluation](#)
7. [Psychological Screen Examination Details](#)
8. [Handling of Information Yielded by Psychological Evaluation and Other Screening](#)

Bishop Consecrations

There were 177 bishop consecrations from 2000 to 2020, 18% of those were women and 82% men. We observed an increase in the proportion of women consecrated as bishops in the last three triennia. In the 2012 to 2014 triennium, women accounted for 13% of the consecrations while men were at 87%. In the 2015-2017 triennium, the percentage of consecrations of women increased to 25% while that of men decreased to 75%. In the most recent triennium 2018-2020, 56% of the consecrations belonged to women while men's percentage decreased to 44%. Currently, the gender proportion of all active bishops is 26% female and 74% male. The Church Pension Group will release a new clergy trend analysis with insights on all three orders of ministry in the second half of 2021.

Job Description for Episcopal Search Consultants

Role and Responsibilities

- Assist Diocesan Standing Committees, the current bishop, and the search, nominating and transition committees during an episcopal search by providing education and guidance as to best practices and options as set forth in transition manual/materials/training approved by the Office of Pastoral Development
- Attend all training and continuing education sessions required by the Office of Pastoral Development
- Participate in evaluation of consultant's performance at the conclusion of the search process

Qualifications, Gifts and Skills

- Familiarity with Episcopal Church polity, search/transition policies and processes, and Episcopal Church canons regarding episcopal elections
- Background as diocesan transition officer, transition search consultant and/or human resources specialist
- Prior experience/training as consultant
- Self-differentiated
- Collaborative leadership style
- Clear and concise communication skills
- Good listening and analytical skills and awareness of group dynamics
- Proficient in family systems
- Background/training in conflict management
- Ability to facilitate and guide group processes without interjecting personal preferences/agendas
- Ability to work with established procedures/practices with an openness and flexibility to adapt them to local custom/practice
- Demonstrated diversity training/awareness

Core Competencies for Clergy and Pastoral Ministers Addressing Alcohol and Drug Dependence and Other Addictive Behaviors

Knowledge

A comprehensive and broad understanding of alcohol and drug dependence and other addictive behaviors and the effects of these on the individual, their family, friends, coworkers, and community. This includes signs of dependence, possible indicators of the disease, intervention, characteristics of withdrawal, stages of recovery, knowledge of support groups and other resources available to the addicted person and family system, competency in understanding and recognizing co-dependence.

Be aware of the generally accepted definition of substance use disorder and other addictive behaviors.

Be knowledgeable about signs of substance use disorder and other addictive behaviors.

Pastoral Knowledge and Skills

Ability to acknowledge and address your own values, issues, and attitudes regarding addictive behavior and dependence.

Awareness of the need for appropriate pastoral understanding and interactions with the addicted person, family system and children. Knowledge of what interactions are appropriate.

Ability to communicate and sustain messages of hope and caring with an appropriate level of concern.

An understanding that addiction erodes and blocks religious and spiritual development; and be able to effectively communicate the importance of spirituality and the practice of religion in recovery, using the scripture, traditions, and rituals of faith community.

Ability to shape, form, and educate a team that welcomes and supports persons affected by dependencies, and educate the community of how prevention strategies can benefit the larger community.

Adapted from: *Preventing and Addressing Alcohol and Drug Problems: A Handbook for Clergy*, National Association for Children of Addiction, 2019

Information Gathering Process About Applicants in Episcopal Search Processes

- Obtain information from the applicant.
 - Property drafted release and indemnification forms from the applicant must be obtained
- Application including education history, employment history, military history, etc.
 - Some sort of behavioral history questionnaire
 - Medical history
 - Misconduct history including Title IV
 - Mental health, behavioral health, substance abuse history
 - Criminal, credit, name changes, motor vehicle, legal proceedings history including domestic and bankruptcy
 - Social media presence
- Extensive interviews with applicant
- “Ten Tough Questions” (it is actually many more than that) typically asked by the Chancellor or some other person at a discernment retreat
- Other?
- Verify information obtained from the applicant.
 - Obtain education records for anything other than bachelor’s degree and initial “seminary” or other theological education used to obtain ordination to the diaconate and priesthood.
 - Verify employment in The Episcopal Church with Recorder of Ordinations
 - Verify any other post-ordination employment outside The Episcopal Church
- Obtain information from Experts and Others
 - Medical evaluation
 - Psychological evaluation
 - Behavioral evaluation
 - Substance abuse evaluation
 - Reference checks- both of all those supplied by the applicant and blind references not supplied by the applicant
- Evaluate the Information.
 - Consultation on meaning of criminal, legal proceedings, credit and other public records
- Make Decisions about the applicant in light of gathered Information

The Screening Process - The Discernment Retreat and Beyond

All those invited to the discernment retreat (semi-finalists) fill out the Life History Questionnaire (LHQ) and Behavioral Screening Questionnaire (BSQ) and submit it directly to Office of Pastoral Development prior to attending the retreat.

All invited to the retreat also complete their medical examination, using the required forms and submit directly to the President of the Standing Committee and the Office of Pastoral Development.

Invitees to the discernment retreat are advised to be prepared to clear their calendars for specific dates in the week or two after the search committee will meet in the event they are selected for the slate and need undergo a psychological exam.

Those not invited to the slate are contacted immediately after the search committee meets and thanked for their participation. We recommend that there is a consistent practice developed around giving feedback to applicants who are not invited to the slate.

Those who will be invited to be nominated are so notified immediately after the search committee and Standing Committee make their decision. Those intended to be nominated contact the psychological examiner for one of the open slots being held for this purpose. The psychological examination happens BEFORE the slate of nominees is announced. Results of the psychological examination (certificate) are e-mailed or telephoned immediately upon completion and simultaneously to the President of the Standing Committee of the electing diocese and the Office of Pastoral Development.

If there is absolutely no information of concern, the President of Standing Committee, after consultation with the Office of Pastoral Development, advises Chair of search committee of the prospective nominee's successful completion of the psychological, behavioral, and substance evaluations. In this case no details regarding any of the evaluations are provided. Only then does the Standing Committee announce the slate of nominees. Ideally, the time from the discernment retreat to announcing the slate of nominees would be about 2-3 weeks. Applicants are advised of this timing.

If the psychological or background screening are negative, applicants can withdraw from the process before they are announced publicly as a nominee.

If there are indications from the psychological or other evaluations or background screening that need further follow-up, that is done as soon as possible, acknowledging that completing it could delay the announcement of a slate of nominees.

This process results in no applicants being included in the slate of nominees before the medical examination, psychological and other evaluations, and other background screening have been completed, avoiding the public relations challenges for the electing diocese and for the applicant(s)

if a nominee has to be removed from the slate of nominees due to the results of the various evaluations and screens.

Psychological Evaluation

The purpose of the psychological evaluation in episcopal election processes is to assure the mental and emotional fitness for episcopal leadership. The psychological evaluation is one piece of a "bundle" of screenings and evaluations of an applicant. The psychological evaluation seeks to evaluate vulnerability/fragility susceptible to stress of episcopal ministry and to identify mental resilience and capacity. In particular, the psychological evaluation needs to expose the following "red light" disorders which would likely disqualify an applicant for the episcopate:

- Personality/Character disorders
- Dual diagnoses
- Conduct disorders

In addition, the psychological evaluation needs to expose the following disorders which may not disqualify an applicant but would require focused evaluation to provide information for a search committee's discernment.

- Depressive and anxiety disorders
- Addiction(s)

The work group consulted with a number of clinicians, from whom three consensual points emerged:

1. Psychological evaluations are often invested with too much weight. They are but one element in a comprehensive process of overall screening.
2. Psychological evaluations are fallible in and of themselves. People can "fudge" them.
3. There is value in having a preliminary piece of the psychological evaluation done by a Social Worker trained in the taking of psychosocial histories, with a summary provided to the examining psychologist.

The work group had the following comments/concerns/questions about this process, which will need to be addressed in more detail in the future.

- Ideally regional examining psychological resources would be developed, all using same protocols, for convenience to various locations and for the sake of diversity, for example east coast, mid-US, west coast.
- This process requires tight turn-around time for psychological evaluation, especially for petition nominees.
- This process requires tight turn-around time when psychological evaluation indicates need for further evaluation.
- The segmentation of the discernment process suggests the need for a single point person for the electing diocese and for the wider Church. The President of the Standing Committee of the electing diocese and the Office of Pastoral Development are the logical places for this role.

Psychological Screen Examination Details

Prior to the psychological evaluation appointment:

- Obtain a Release from the applicant for the evaluator to contact providers of prior treatment especially hospitalizations, dual diagnoses, suicidality.
- Explanation of Release coming by email, to be signed and brought to appointment,
- Evaluator reviews Life History Questionnaire and Behavioral Screening Questionnaire obtained from the President of the Standing Committee or the Office of Pastoral Development.
- Evaluator reads all applicant materials submitted to the search committee. This is not the current practice.
- A Social Worker conducts a social history interview, forwards summary to the evaluator. This interview includes:

Discussion of items from the Behavioral Screening Questionnaire

Preliminary exploration of prior psychological/substance abuse history. The psychological evaluation process takes 2 days.

Day One:

- Completion of testing (Day 1 morning);
- Testing scored electronically - stat results to examining psychologist
- Lunch and free hour
- Meeting with substance abuse specialist for screening (2.5 hours) about use of alcohol/drugs/other addictions. Family history w/alcohol/drugs is explored. Summary provided to examining psychologist

Day Two:

- Neurocognitive (NC) screening [memory, reasoning power, logic]
- Review of results of NC screening - report to file
- Clinical interview #1 - Psychologist (60 minutes)
- Review of items from Life History Questionnaire and Behavioral Screening Questionnaire
- Depression screening
- Mood stability
- Self-awareness exploration
- Stress management
- Review of Rx history, relevant medical history
- Lunch and break
- Clinical Interview #2 - Psychologist (90 minutes)
- Projective testing (TAT? Mixed opinions on usefulness of these)
- Sexual history and present sexual adjustment
- Personality Structure
- Deeper focus on family of origin
- Summary and Recommendations from psychological evaluation to applicant

Handling of Information Yielded by Psychological Evaluation and Other Screening

Clarity and consistency around this step in the discernment process is vital. Data tell us this is one of the areas of confusion, which has resulted in unsuitable people being on the slate.

General principles:

- [Do nominees sign a Release at the beginning of the process, accepting that their personal info, as it emerges during this process, will be shared w appropriate parties on need-to-know basis? Privacy vs Confidentiality]
- The sitting bishop does not have access to psychological evaluation results and does not participate in the search committee's discernment work.
- All costs/expenses for psychological evaluation, further evaluations (if applicable) are the responsibility of the electing diocese.
- Names on the slate of nominees are not announced unless/until all screenings and evaluations are completed and in good order.
- Decisions about not continuing an applicant to be on the slate of nominees because of findings from psychological evaluation are made through consultation amongst at least two parties. Decisions are not made by one person acting alone.
- If the psychological evaluation reveals areas of concern, we (the Church) owe it to the applicant to advise them accordingly.

Fundamentally, we can envision three broad outcomes from psychological evaluation

All Clear (green light)

- Applicant continues to the slate of nominees, per their personal discernment
- Communicating this: Chair of search committee
- Clinical file held in by the President of the Standing Committee and the Office of the Presiding Bishop, generally in the Office of Pastoral Development

Area(s) of Concern (yellow light)

- Applicant referred to appropriate provider to undertake further evaluation
- Applicant must pursue further evaluation if discerning continues
- Communicating this: President of the Standing Committee or the Bishop for the Office of Pastoral Development
- Clinical file stays open pending results of further evaluation
- File ultimately held in the permanent records of the electing diocese and in the Archives of The Episcopal Church

Continuation in discernment is contraindicated (red light)

- Applicant given information on psychological evaluation findings
- Communicating this: President of the Standing Committee or the Bishop for the Office of Pastoral Development, ideally by phone
- Note: per the proposed process, no opportunity is provided for appeal or second opinion
- If the person is elected the bishop, one copy of the file is placed in the permanent records of the diocese and another copy is placed in the Archives of The Episcopal Church

Various parties may be involved in evaluating and acting upon results of the psychological evaluation:

- President, Standing Committee of Electing Diocese
- Chair diocesan search
- Office of the Presiding Bishop
- Office of Pastoral Development
- Applicant Nominee and Family
- Entire search committee
- Entire Standing Committee
- Chancellor of electing diocese

Specific flow of Information from the proposed process

- Applicant signs Authorization and Release
- The applicant completes the Life History Questionnaire (LHQ) and Behavioral Screening Questionnaire (BSQ) (digitally? encrypted?)
- LHQ and BSQ are transmitted to examining psychologist
- Completed medical exam form to examining psychologist
- Background check reports simultaneously to the President of the Standing Committee and the Office of Pastoral Development
- Social Worker conducts (Zoom, Skype, etc.) a 60-min social history interview
- Social Worker transmits summary of the social history to examining psychologist
- Personal meeting between applicant and examining psychologist
- Examining psychologist submits canonical certificate and evaluation simultaneously to President of the Standing Committee and the Office of Pastoral Development
- President of the Standing Committee or Office of Pastoral Development notifies Chair of search committee of successful psychological evaluation results

Retention and Destruction of Background Screening and Various Evaluations

- For all applicants who are not elected and ordained bishop as a result of the particular episcopal election process, all copies of all background screening and various evaluations are collected by the Standing Committee President and destroyed
- For the applicant elected and ordained bishop as a result of the particular episcopal election process, one copy of all background screening information and all information regarding the various examinations and evaluations is placed in the permanent records of the electing diocese
- For the applicant elected and ordained bishop as a result of the particular episcopal election process, one copy of all background screening information and all information regarding the various examinations and evaluations is sent to and maintained by the Archives of The Episcopal Church
- For the applicant elected and ordained bishop as a result of the particular episcopal election process, all copies of all background screening and various evaluations other than the two copies described above, are collected by the Standing Committee President and destroyed

TASK FORCE TO COORDINATE ECUMENICAL & INTERRELIGIOUS WORK

Membership

The Rt. Rev. R. William Franklin, <i>Chair</i>	Western New York, II	2024
The Rev. Canon Dr. C. Denise Yarbrough, <i>Vice-Chair</i>	Rochester, II	2024
The Rev. Canon Sharon Alexander	West Tennessee, IV	2021
The Ven. Dr. Walter Baer	Convocation of Episcopal Churches in Europe, II	2024
The Rev. Canon Valerie Balling	New Jersey, II	2021
Ms. Kate Bellam	Connecticut, I	2024
The Rev. Jaime Briceño	Chicago, V	2024
The Rt. Rev. Scott Hayashi	Utah, VIII	2024
Dr. Lucinda Mosher	Florida, IV	2024
The Rev. David Simmons	Milwaukee, V	2024
The Rt. Rev. Eugene Sutton	Maryland, III	2024
The Rev. Marisa Tabizon Thompson	Nebraska, VI	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Luz Cabrera (2019-2020), replaced by The Rev. Valerie Balling (2020-present)

Acknowledgements

Margaret Rose; Chuck Robertson, Richard Mammana (TEC), Hank Jeannel (TEC EIR intern); Kyle Tau (UMC);

Mandate

2018-D055 Coordination of Ecumenical and Interreligious Work

Resolved, the House of Deputies concurring, That the 79th General Convention, pursuant to Joint Rule IX.22, create a task force with membership appointed by the Presiding Bishop and the President of the House of Deputies to report annually to the Standing Commission on Structure, Governance, Constitution and Canons (SCSGCC) its work in addressing matters of ecumenical and interreligious significance, including but not limited to: respond to ecumenical and interreligious issues that may arise between meetings of General Convention; have primary responsibility for developing responses to ecumenical and interreligious documents; assist the Presiding Bishop, appropriate DFMS staff, and the Executive Council with formulating and implementing ecumenical and interreligious policy; and provide such other assistance and counsel to the SCSGCC with respect to matters that come before the SCSGCC that have ecumenical or interreligious significance, in collaboration with the Deputy for Ecumenical and Interreligious Relations and Episcopal Diocesan Ecumenical and Interreligious Officers; and be it further

Resolved, That the task force shall begin on January 1, 2019, and end at the end of the 81st General Convention, unless its mandate is extended by that Convention; and be it further

Resolved, That the task force shall provide an interim report to the 80th General Convention; and be it further

Resolved, That the membership of this task force include up to three Bishops appointed by the Presiding Bishop for six-year terms; up to three Priests and/or Deacons and up to three lay persons appointed by the President of the House of Deputies for six-year terms; and up to three members of the SCSGCC appointed by the SCSGCC.

Summary of Work

Resolution D055 of the 79th General Convention of The Episcopal Church (TEC) in 2018 established a Task Force of the Standing Commission on Structure, Governance, Constitution and Canons (SCSGCC) with the mandate to coordinate and respond to ecumenical and interreligious issues that may arise between meetings of General Convention; have primary responsibility for developing responses to ecumenical and interreligious documents; assist the Presiding Bishop, appropriate DFMS staff, and the Executive Council with formulating and implementing ecumenical and interreligious policy; and provide such other assistance and counsel to the SCSGCC with respect to matters that come before the SCSGCC that have ecumenical or interreligious significance, in

collaboration with the Deputy for Ecumenical and Interreligious Relations and Episcopal Diocesan Ecumenical and Interreligious Officers.

Throughout the triennium, the Task Force to Coordinate Ecumenical & Interfaith Work (TFCEIW) met as an interim body electronically and by sub-committee to further the work to achieve its mandate. The membership of this task force is directed to include up to three Bishops appointed by the Presiding Bishop for six-year terms; up to three Priests and/or Deacons and up to three lay persons appointed by the President of the House of Deputies for six-year terms; and up to three members of the SCSGCC appointed by the SCSGCC.

This task force is working to create communication and consistency across the various ecumenical and interfaith efforts of TEC, especially in reference to policies and “like” documents and agreements. It is embracing the philosophy articulated by the Rev. Margaret Rose that denominational ecumenical work is about “engaging the other; knowing ourselves,” and aiming to bridge the gaps in work across faith groups without filling them in at the loss of Episcopal identity.

TASK FORCE STRUCTURE AND AREAS OF FOCUS

Following initial discussion on the work that is and should be happening under this umbrella, four sub-committees were developed to address the mandate: Governance; Theology; Anglican Communion, Europe; Bi-Lateral Discussions. Additional ecumenical and interfaith projects are being acted upon by individuals or TEC staff members.

Governance (David Simmons, chair):

The primary aim of this sub-committee is the determination of resolutions that need to be proposed at the 80th General Convention. Aspects of this include reviewing past resolutions, writing continuing resolutions for ongoing work, and working with the other sub-committees to identify and craft new legislative proposals and resolutions. The final compilation of resolutions being proposed are found later in this Blue Book application.

Theology (Denise Yarbrough, chair):

The work of this sub-committee is centered in the confluence of interreligious work and issues of intersectionality, anti-Semitism work (perhaps with consultation from the Anti-Defamation League), and various statement updates. Following the review of current overarching TEC documents in this area, the sub-committee noted that the TEC documents on Jewish-Christian Guidelines and on interfaith relations have not been reviewed in many years. As such, this sub-committee is in the process of reassessing and drafting updated statements to be offered to TEC for study and potential future legislative resolutions by the 81st General Convention.

United Methodist Church (UMC) and Other Full Communion Discussions (Scott Hayashi, Chair):

The primary focus of this subcommittee is the UMC-TEC work. A successful joint gathering in Utah was held that might serve as a model for other areas. Originally, this sub-committee and Task Force

intended to bring legislation around this proposal to General Convention in 2020; however, the pandemic prevented the UMC from gathering as expected in 2020 to determine their future. Thus, TEC is also holding on presenting or confirming formal legislation with UMC at this time.

In addition, ARCUSA, LECC, MECC, PCUSA, ELCA, and the four way agreement between the Evangelical Lutheran Church of America, the Anglican Church of Canada, the Evangelical Lutheran Church in Canada, and TEC, are under the umbrella of this subcommittee and will lead to legislative proposals.

Anglican Communion, Europe, and related (Eugene Sutton and Walter Baer, co-chairs):

This sub-committee is charged with the review of relationships and assembly of potential legislation to be considered at General Convention relating to partnerships in Europe. The memorandum of understanding with the Church of Sweden, the dialogue with the Evangelical Church of Bavaria, and the work of the Committee of Anglican Bishops in Europe are central to the charge of this subcommittee. Additionally, the Lambeth Conference originally scheduled for 2020 directed some of the work of this group. Specific information and proposals from these discussions follow.

Resolutions Referred to the Task Force on Ecumenical Relations in Europe

Resolution 2018-C059 Commend Dialogue with the Evangelical Church in Bavaria

Resolved, That the 79th General Convention approve and commend the existing relationship between the Convocation of Episcopal Churches in Europe (Convocation) and the Evangelisch-Lutherische Kirche in Bayern (ELKB) (Evangelical Church in Bavaria); and be it further

Resolved, That the 79th General Convention approve and commend the process of exploring deeper relations and the dialogue toward full communion between The Episcopal Church and the ELKB.

Resolution 2018-Do85 Communion Relationship with Church of Sweden

Resolved, That the 79th General Convention acknowledge and affirm the existing full communion relationship between The Episcopal Church and the (Evangelical Lutheran) Church of Sweden, in furtherance of the 78th General Convention's Resolution B004, which received and commended the "Report on the Grounds for Future Relations Between the Church of Sweden and The Episcopal Church," and called on the Presiding Bishop to explore ways for the relationship with the Church of Sweden to be deepened, and which full communion relationship was formally celebrated during a Eucharist service at Uppsala Cathedral, Sweden in November 2015, a service led by former Episcopal Church Presiding Bishop Katharine Jefferts Schori, at the invitation of Presiding Bishop Michael Curry, and the Church of Sweden Archbishop Antje Jackelén; and be it further

Resolved, That the 79th General Convention request the Presiding Bishop to prepare, in concert with the Church of Sweden, a memorandum of understanding setting forth the terms and procedures of the full communion between The Episcopal Church and the Church of Sweden.

THE EVANGELICAL LUTHERAN CHURCH OF BAVARIA

The discussions between the Evangelische-Lutherische Kirche in Bayern (ELKB) and The Episcopal Church (TEC) began as the result of a meeting in June 2013 between Landesbischof Dr. Bedford-Strohm and Presiding Bishop the Most Rev. Dr. Jefferts-Schori. In their meeting, the two Presiding Bishops expressed the wish and challenge for the two churches to explore the possibility of closer communion, including, if possible, full communion with interchange of ministers and sharing of the sacraments.

A close relationship has existed for over 50 years between Episcopal Church and the ELKB in Munich, especially between the Church of the Ascension in Munich, a parish of the Convocation of Episcopal Churches in Europe, and the Emmauskirche, a parish of the ELKB. Ascension has shared space in the Emmauskirche since 1970. Elsewhere in Bavaria, a similar close TEC-ELKB relationship exists with the Episcopal missions in Nuremberg and Augsburg, who also share space with ELKB parishes.

Conversations between representatives of the ELKB and TEC began in 2013 shortly after the encounter between Presiding Bishops Jefferts-Schori and Bedford-Strohm, and soon took on the characteristics of a dialogue. Meetings in subsequent years took place in New York, Tutzing, Paris, and Augsburg. Numerous smaller meetings took place between in-person meetings.

The conversation/dialogue committee included representatives from TEC, the ELKB, and:
The Director for Unity, Faith and Order of the **Anglican Communion Office**,
The Director of the Council for Christian Unity of the **Church of England**,
A representative of **Inter-Anglican Standing Commission for Unity, Faith and Order**
The Chair of the **German National Committee of the Lutheran World Federation**,
The Evangelische Kirche in Deutschland (EKD) co-chair of the **Meissen Commission**, and
The **Director for Ecumenical and Inter-Religious Relations of the ELCA**.

CURRENT AND FORMER EPISCOPAL PARTICIPANTS IN THE TEC-ELKB CONVERSATION:

The Rt. Rev. Mark D.W. Edington (2019-present)

The Rev. Christopher Easthill (2019-present)

The Ven. Walter Baer (2017-present)

The Rev. Margaret Rose (2013-present) *TEC staff representative*

The Rt. Rev. Pierre W. Whalon (2013-2019)

The Rev. Steven Smith (2013-2019)

Kathryn L. Johnson, PhD (2013-present), Director for Ecumenical and Inter-Religious Relations (ELCA)

Resolution 2018-C059 **approved and commended the process of exploring deeper relations and the dialogue toward full communion between TEC and the ELKB.**

Based on this **mandate**, the dialogue committee has moved forward in this triennium to develop a proposed agreement of full communion between TEC and the ELKB, found at the conclusion of this Blue Report. The agreement “Sharing the Gifts of Communion: An Agreement of Full Communion between the Evangelical Lutheran Church in Bavaria and The Episcopal Church” is being proposed to the 80th General Convention. The Task Force commends this document for study and possible implementation. Background papers on this dialogue and additions or changes to this proposed agreement, can be downloaded at the Episcopal Church website at: www.episcopalchurch.org/ecumenism.

THE CHURCH OF SWEDEN

In this triennium, the Episcopal Church and the Church of Sweden have continued to live into their full communion relationship, as set forth in Resolutions 2015-A070 and 2018-DO85. Our common work in this triennium was notably in the area of Climate Change (together with the ELCA), and our ongoing commitment to engage the issue of refugee and asylum work. At the ordination and consecration of the Rt. Rev. Mark Edington as Bishop in Charge of the Convocation of Episcopal Churches in Europe, the Archbishop of Uppsala, the Most Rev. Antje Jackelen, was represented by the Rev. Per Gyllenör. Church of Sweden congregations and Episcopal congregations are found together in several European cities including, Paris, Brussels, Rome, Frankfurt and Munich. In recent years, the closest cooperation has existed in Brussels and in Frankfurt.

Work on a memorandum of understanding setting forth the terms and procedures of the full communion between the two churches continues. Due to staffing changes in the ecumenical office of the Church of Sweden and the pandemic, the memorandum cannot be reported out at this time. That work will continue through the next year / triennium.

ADDITIONAL AREAS OF DISCUSSION AND ACTION

Education: It is thought that the depth and breadth of the work done in this area, especially at a denominational level, is unknown by many. There are instances when people are voting without clarity, for example a lack of understanding of the UMC Book of Discipline and the potential ramifications it could have on a formal partnership with TEC. As a result, this Task Force is pursuing and developing ways to offer education and history to members of the House of Bishops and members of the House of Deputies. This is also intended to strengthen ecumenical and interfaith work that is done at the diocesan and local level.

Tool kit for parishes: One outgrowth of the education commitment being considered is the establishment of an online “tool kit” for local ecumenical and interfaith engagement. Consolidating best practices, reference points, and more, will provide a real service to TEC at all levels in a rapidly evolving and global world.

History and Role of the Chicago/Lambeth Quadrilateral: Part of the discussion this triennium has been around the Chicago/Lambeth Quadrilateral, the current rubric for some formalized denominational partnerships at the denominational level. The document has a sound grounding in history and theology; the discussion has revolved around questions of whether or not it is still adequately complete or if other factors need to be at play when considering ventures such as the Call to Common Mission (2001 with ELCA) and the UMC relationship, as well as how we understand the Anglican Communion.

PARTNERS IN WORK

By its definition, this Task Force does not stand alone. To accomplish the mandate of General Convention, the TFCEIW is connected to other parts of TEC engaged in interfaith or ecumenical efforts. The closest relationship is with the TEC Office of Ecumenical and Interfaith Relations. Their work, as well as the breadth and depth of their knowledge, has been a crucial part of this effort.

Other partners include the Office of Global Partnerships throughout the triennium, the Episcopal Church work at the United Nations, the Episcopal Diocesan Ecumenical and Interfaith Officers (EDEIO) group, and the various task forces, committees, and dialogue groups who are engaged in specific relationships, such as the TEC-PCUSA dialogue.

GOALS FOR THE TFCEIW FOR THE NEXT TRIENNium

- Propose an updated Jewish-Christian Guidelines statement
- Propose an updated statement on interfaith relations
- Develop and propose a formal statement on the Episcopal Theology of Ecumenism that takes into account the history, practices, and reasons for this engagement
- Create an online resource for local ecumenical and interfaith work
- Further the work of the ecumenical dialogue groups
- Clarify and update current memorandums of understanding and other important, related documents
- Review Title IV applications to clergy from churches in full communion
- Increase the visibility of the work of the Office of Ecumenical and Interfaith Relations

Proposed resolutions

A091 Evangelical Lutheran Church in Bavaria-Episcopal Dialogue

Resolved, the House of _____ concurring, That the 80th General Convention of The Episcopal Church receive and commend *Sharing the Gifts of Communion*, available in the report to the 80th General Convention of the Task Force to Coordinate Ecumenical and Interreligious Work, as the basis for a relationship of full communion to be established between The Episcopal Church and the Evangelische Lutherische Kirche in Bayern (ELKB) (Evangelical Lutheran Church in Bavaria); and be it further

Resolved, that this document be shared widely within the church for discussion and comment, with a view of accepting it as the basis for establishing a relationship of full communion between the two churches when appropriate.

EXPLANATION

The document *Sharing the Gifts of Communion* is available as a supporting document to this resolution. It is also available within the report to the 80th General Convention of the Task Force to Coordinate Ecumenical and Interreligious Work (otherwise known as their "blue book" report). Blue Book reports to the 80th General Convention are available on the blue book page of the General Convention website at <https://www.generalconvention.org/bluebook2021>.

A092 Churches Beyond Borders

Resolved, the House of _____ concurring, That the 80th General Convention of The Episcopal Church accept the Memorandum of Mutual Recognition of Relations of Full Communion dated September 26, 2018 by and among The Episcopal Church, the Evangelical Lutheran Church in America, the Anglican Church of Canada and the Evangelical Lutheran Church in Canada (which can be found on the Ecumenical and Inter-religious page of The Episcopal Church's website at <https://www.episcopalchurch.org/ministries/ecumenical-interreligious/> and which shall be added to the Ecumenical and Interfaith Relationships page of the Archives upon acceptance of the Memorandum by the General Convention <https://www.episcopalarchives.org/sceir>) the basis for a relationship of full communion to be established among the four churches upon the acceptance of the Memorandum by each of the four churches; and be it further

Resolved, that the 80th General Convention recognizes the Evangelical Lutheran Church in America, the Anglican Church of Canada, and the Evangelical Lutheran Church in Canada have previously accepted the Memorandum through actions of their respective governing bodies; and be it further

Resolved, that the 80th General Convention of The Episcopal Church request that the Most Rev. Michael B. Curry, Presiding Bishop of The Episcopal Church, convey this action to the Presiding Bishops and Primates of the other churches that are a party to the Memorandum; and be it further

Resolved, that the acceptance of the Memorandum shall not affect or alter the current relationship of full communion between The Episcopal Church and the Anglican Church of Canada recognized by Canon I.20.1(a) or the current relationship of full communion between The Episcopal Church and the Evangelical Lutheran Church in America recognized by Canon I.20.2; and be it further

Resolved, that the ecumenical officers of The Episcopal Church, working with the Task Force to Coordinate Ecumenical and Interreligious Work, establish policies and procedures to facilitate exchange of ministry between the Evangelical Lutheran Church in Canada as set forth in the Memorandum; and be it further

Resolved, that Canon I.20.1 be amended by adding a new subsection, as follows:

(d) The Episcopal Church has a relationship of full communion with the Evangelical Lutheran Church of Canada under the terms of the Memorandum of Mutual Recognition of Relations of Full Communion dated September 26, 2018 by and among The Episcopal Church, the Evangelical Lutheran Church in America, the Anglican Church of Canada and the Evangelical Lutheran Church in Canada, which was accepted by the 80th General Convention of The Episcopal Church as Resolution 2021-A__.

EXPLANATION

More information can be found at <https://www.episcopalchurch.org/ministries/ecumenical-interreligious/ecumenical-dialogue-partners/>

A093 The Episcopal Church-United Methodist Church Dialogue

Resolved, the House of _____ concurring, That this 80th General Convention commends the current version of “A Gift to the World, Co-Laborers for the Healing of Brokenness,” which was prepared and distributed by The Episcopal Church-United Methodist Dialogue; and be it further

Resolved, that this Convention encourages all Episcopalians to utilize the many resources available to understand the substance of this dialogue and its goal of full communion. Resources can be found on the websites of The Episcopal Church (episcopalchurch.org), the Episcopal Diocesan Ecumenical

and Interreligious Officers (edeio.org), and umc-tec.org, a website supporting full communion between the United Methodist Church and The Episcopal Church; and be it further

Resolved, that this Convention encourages and supports prayerful consideration by all Episcopalians during the coming triennium of this significant step forward in response to our Lord’s fervent wish “that all may be one.”

A094 Affirm Ongoing Work and Dialogue with Ecumenical Partners

Resolved, the House of _____ concurring, That the 80th General Convention joyfully affirms the continuation of the ecumenical dialogues in which The Episcopal Church is engaged: the Presbyterian Church (USA)-Episcopal Dialogue; the Anglican-Roman Catholic Dialogue (ARCUSA), and the work toward full communion with the United Methodist Church (UMC). And be it further

Resolved, that this Convention joyfully affirms the continuation of work of the dialogue with the Evangelical Lutheran Church in Bavaria (Evangelisch-Lutherische Kirche in Bayern) and commends the document *Sharing the Gifts of Communion* to the church for consideration. And be it further

Resolved, that this Convention joyfully affirms the continued coordinating committee work with our full communion partners, the Evangelical Lutheran Church in America and the Moravian Church (Northern Province and Southern Province). And be it further

Resolved, that this Convention joyfully affirms our representation and participation in national ecumenical bodies, including the National Council of Churches (NCC), Churches Uniting in Christ (CUIC) and Christian Churches Together (CCT).

EXPLANATION

More information about this work can be found at:

<https://www.episcopalchurch.org/ministries/ecumenical-interreligious/ecumenical-dialogue-partners/>

Supplemental Materials

Table of contents:

1. [Sharing the Gifts of Communion](#)

Sharing the Gifts of Communion

An Agreement of Full Communion between the Evangelical Lutheran Church in Bavaria and The Episcopal Church.

Introduction

Since the 1970s, a fruitful partnership has been built up in Bavaria between the Convocation of Episcopal Churches in Europe, part of The Episcopal Church (TEC), and the Evangelical Lutheran Church in Bavaria (Evangelisch-Lutherische Kirche in Bayern; ELKB), which expresses itself in a consistent history of sharing in worship and prayer and working together in diaconal projects.

Through this work together, Episcopalians and Lutherans in Bavaria have come to understand more deeply their shared mission and the bonds between their churches. Building on existing agreements between Anglicans/Episcopalians and Lutherans in Germany, North America and Northern Europe, TEC and the ELKB are now ready to move into a relationship of full communion, enabling full interchangeability of ministries and full participation in one another's mission.

This current agreement, made specifically between TEC and the ELKB, has been informed by a number of previous agreements between Anglican and Lutheran churches:

- the *Meissen Agreement* (1991), between the Church of England and the Evangelical Church in Germany (EKD), achieves mutual recognition of churches and mutual Eucharistic hospitality, but does not achieve full communion or interchangeability of ordained ministries;^[1] and on the three regional agreements of (full) communion between Anglicans and Lutherans:
- the *Porvoo Common Statement* (1992/93), between the European member churches of the Anglican Communion and most of the Nordic and Baltic Lutheran churches;^[2]
- *Called to Common Mission* (1999/2000), between TEC and the Evangelical Lutheran Church in America;^[3]
- the *Waterloo Declaration* (2001), between the Anglican Church of Canada and the Evangelical Lutheran Church in Canada.^[4]

Through its membership in the Lutheran World Federation (LWF), the ELKB is in communion with the Scandinavian and Nordic Lutheran churches, the ELCA and the Evangelical Lutheran Church in Canada. TEC, the Anglican Church of Canada, and the British and Irish Anglican churches are in communion through their membership of the Anglican Communion. The LWF and the Anglican Communion are also linked through the *Joint Declaration on the Doctrine of Justification* (1999) agreed between the LWF and the Roman Catholic Church, the substance of which was affirmed by the Anglican Communion in 2017.

In many parts of the world, member churches of the LWF and the Anglican Communion work in close cooperation, with or without an agreement, and the Third Anglican Lutheran International Commission urged churches to develop or adopt agreements that reflect this cooperation.^[5] In

this spirit, this agreement is offered as a further example and invitation to other member churches of the Anglican Communion and the Lutheran World Federation to consider in their contexts how such a move forward could be accomplished.

Relationships between TEC and the ELKB have thus developed within the context of a long history of ecumenical dialogue between Lutheran and Anglican/Episcopal churches, which has shaped and enriched the experiences of many Anglicans and Lutherans. In particular, through *Called to Common Mission*, mutual relationships between the ELCA and TEC have become a lived reality. As distinctive churches with their own particular relationships, in making this current agreement, TEC and the ELKB draw on the extensive network of mutual experience of mission and ministry, as well as the experience of working and worshipping together locally. The purpose of the current agreement is to foster and deepen that common work through recognizing a relationship of full communion between TEC and the ELKB.

TEC and the ELKB have already taken important steps towards full communion. The 1987 *Niagara Report* of the Anglican-Lutheran International Continuation Committee and *Receiving One Another's Ordained Ministries* of the Inter-Anglican Standing Commission on Unity, Faith and Order (received by ACC-16, 2016), define stages of relations between churches. Relationships between the TEC and the ELKB have long-since reached stage 1 (recognition of one another as churches) and stage 2 (provisional structures exist which promote mutual growth). The intention in this agreement is to move to stage 3, the exploration of particular practices with respect to *episcopé* which will enable the full interchangeability of ministries, and stage 4, the public declaration and celebration of full communion.

In moving into this relationship, TEC and the ELKB understand full communion to be a relation between distinct churches in which each recognizes the other as a catholic and apostolic church holding the essentials of the Christian faith. Within this new relation, churches become interdependent while remaining autonomous. Full communion includes the establishment of appropriate recognized organs of regular consultation and communication, including episcopal collegiality, to express and strengthen the fellowship and enable common witness, life, and service. Diversity is preserved, but this diversity does not divide and is not static. Neither church seeks to remake the other in its own image, but each is open to the gifts of the other as it seeks to be faithful to Christ and his mission. They are together committed to a visible unity in the church's mission to proclaim the gospel and administer the sacraments.^[6]

Specifically, TEC and the ELKB understand this to include welcoming one another's members to receive sacramental and other pastoral ministrations; mutual recognition and interchangeability of ordained ministries; freedom to use one another's liturgies; mutual invitations to participate liturgically in one another's ordinations and installations of clergy, including bishops; and the development of suitable structures for consultation to express, strengthen, and enable common life, witness, and service, to the glory of God and the salvation of the world.^[7]

Such a relationship is based on:

- a common confession of the apostolic faith in word and life;
- the sharing of one baptism, the celebration of one eucharist and the service of a reconciled, common ministry;
- bonds of communion which support the churches at every level to guard and interpret the apostolic faith, to teach authoritatively, to share resources, and to bear effective witness in the world.^[8]

Signs of Communion that already exist

Lutherans and Anglicans recognize that they already share communion in the Triune God through their acceptance of the common gift of the Holy Scriptures; their affirmation of the sacraments of baptism and the eucharist as constituent for the church; their shared affirmation of the Apostles' and Nicene creeds; their shared traditions of worship, spirituality and theology; and their distinct but related experiences of the Reformation.

Anglicans and Lutherans both recognize Christ's church as "the assembly of all believers among whom the gospel is taught purely, and the sacraments are rightly administered".^[9] Anglicans and Lutherans hold the ordained ministry of Word and sacrament to be a gift of God to the church, and recognize the necessity of structures of pastoral oversight and authority.

Anglicans and Lutherans have never condemned one another as churches. TEC and the ELKB now affirm that they recognize in one another the essentials of the one catholic and apostolic faith, to which their statements of faith witness, including the *Augsburg Confession*, Luther's *Small Catechism*, and TEC's *Book of Common Prayer* (1979), and they affirm the substance of the doctrinal consensus articulated by successive international Anglican-Lutheran dialogues.

TEC and the ELKB affirm the cooperation between Episcopalians and Lutherans in Bavaria, including the mutual invitation to receive communion, to share services and joint diaconal work. In the absence of a formal agreement, the provisions of the Meissen Agreement pertaining to ministry and worship have tacitly been taken to apply for TEC and the ELKB in this local context.

Ministry and oversight

The key question for this ecumenical relationship has been that of the theology of ordained ministry, and in particular that of episcopal ministry and its relation to succession. This agreement welcomes the consensus reached on this question through the *Porvoo Common Statement*, *Called to Common Mission*, and the *Waterloo Declaration* and affirms the theological contribution made by those agreements in moving towards a shared understanding. This agreement draws on those earlier agreements, as well as on further reflection specific to the relationship between TEC and the ELKB, to apply the consensus already reached to the specific situation in Bavaria, and thus to the German context.

Together with the *Porvoo Common Statement*, TEC and the ELKB affirm that “the primary manifestation of apostolic succession is to be found in the apostolic tradition of the Church as a whole. The succession is an expression of the permanence and, therefore, of the continuity of Christ’s own mission in which the Church participates.”^[10]

Together with *Called to Common Mission*, TEC and the ELKB “acknowledge that one another’s ordained ministries are and have been given by God to be instruments of God’s grace in the service of God’s people, and possess not only the inward call of the Spirit, but also Christ’s commission through his body, the church.” They agree that “ordained ministers are called and set apart for the one ministry of Word and Sacrament, and that they do not cease thereby to share in the priesthood of all believers”, and that these ministers “fulfill their particular ministries within the community of the faithful and not apart from it.” They recognize that “the priesthood of all believers affirms the need for ordained ministry, while at the same time setting ministry in proper relationship to the laity.”^[11]

Together with *Called to Common Mission*, TEC and the ELKB also affirm that “personal, collegial, and communal oversight is embodied and exercised in both [...] churches in a diversity of forms, in fidelity to the teaching and mission of the apostles.”^[12] Together with the LWF’s 2007 Statement *Episcopal Ministry within the Apostolicity of the Church*, TEC and the ELKB affirm that in both churches, “Bishops are called to a special role of oversight in the church, but the wider community also is called to participate in oversight and to judge the way in which episcopal ministry is being carried out.”^[13] They acknowledge also that in some other churches of the LWF, and also some other churches of the EKD, those who exercise such “special role of oversight” are not referred to as bishop, but rather, for instance, as Church President or Präses, similarly a Regional Bishop may be known as *Landessuperintendent* or *Oberkirchenrat*.^[14] TEC and the ELKB also recognize that this ministry of oversight – *episkopé* – is exercised not only through bishops but also through the synods and other leadership structures of the two churches, and that the relationship between bishops and these structures is an important aspect of the ministry of oversight in both churches.^[15]

Together with *Called to Common Mission*, TEC and the ELKB agree that the historic episcopate “can be locally adapted and reformed in the service of the gospel.”^[16] Since the sixteenth century, the traditions from which both churches emerged have experienced both continuity and change in their structures of *episkopé*. Different practices of oversight developed in local contexts in response to diverse ecclesiological and political realities and theological understandings. Anglicans maintained episcopal-diocesan structures and continued to use the term “bishop” to describe these ministries after the Reformation. Lutherans in Germany provided *episkopé* by adapting existing structures, and described these ministries using a variety of terms, including “superintendent”, the preferred translation of the New Testament term *episkopos*.

The establishment of Anglican parishes on the North American continent spread steadily following the first recorded Anglican celebration of Holy Communion in North America in 1607 in Jamestown, Virginia. Prior to the American Revolution, representatives of the Bishop of London

known as commissaries provided oversight in some colonies. In the context of American Independence from Great Britain, the first American bishops were elected, and in 1789 The Episcopal Church was constituted as a separate ecclesiastical jurisdiction and as a church independent of state authority. From this time TEC has affirmed the importance of synodical government and bishops have been elected. The structures established in 1789 continue to the present.

General Convention, made up of the House of Bishops and the House of Deputies (equal numbers of elected clergy and lay people), sets the policy of the Episcopal Church. Its bishops are democratically elected by their respective diocesan conventions or synods and are answerable to the House of Bishops; they are to be servants of the church and not its lords. The Presiding Bishop of the Episcopal Church is a member of the House of Bishops, who since 1928 has been elected by that House, with confirmation by the House of Deputies. A similar structure is mirrored in the dioceses, which have diocesan conventions (made up of the diocesan clergy and elected lay delegates), that work closely with the bishop. A bishop is elected at the diocesan convention by the clergy and lay delegates and is consecrated only after confirmation of this election by a majority of TEC's diocesan bishops and diocesan standing committees representing the whole church. At the consecration, bishops are consecrated through prayer and laying on of hands by at least three bishops, usually including bishops of the ELCA and other full communion partners, with the involvement of representatives of the diocese, both priests and lay persons, especially in presenting the bishop-elect for consecration, and in the liturgy.

The Evangelical Lutheran Church in Bavaria was formed in 1808 after the foundation of the Kingdom of Bavaria in 1806. The General Synod was established in 1848, initially sharing responsibility with the ruling (Roman-Catholic) Bavarian monarch who acted as "*summus episcopus*", in direct continuity with the role of the late medieval German prince bishops.^[17] After the fall of the Bavarian monarchy in 1918, the ELKB (*Landeskirche*) was constituted, with a church president (*Kirchenpräsident*), who since 1933 has been referred to as bishop (*Landesbischof*). The bishop works together with the Synod (*Landessynode*, made up of two-thirds lay people and one third clergy) and its Executive Committee (*Landessynodalausschuss*), and also chairs the Church Governing Board (*Landeskirchenrat*), which is responsible for the day-to-day running of the church. Oversight is exercised through these four church-governing bodies. The *Landessynode* elects the *Landesbischof*. Regional bishops (*Regionalbischöfe*) or *Oberkirchenräte*, who are members of the *Landeskirchenrat*, share the responsibility for oversight in their episcopal areas or areas of responsibility through ordination and visitation.

Today, pastors of the Evangelical Lutheran Church in Bavaria are ordained by the *Landesbischof* or regional bishops. Ordination is a onetime act. Central elements of the liturgy are the prayer for the Holy Spirit, the laying on of hands and the blessing of the ordinand. The ordination rite provides that assistants say a biblical word of blessing and also lay on hands. These assistants are not restricted to the ordained and may include (for instance) members of the parish council (vestry) or the candidate's family and friends. The installation of a bishop is understood as the installation of an already ordained pastor into a new office now with

episcopal functions. The *Landesbischof* is installed by the presiding bishop of the Evangelical Lutheran Church of Germany; the regional bishops are installed by the *Landesbischof*. It is good practice – but not strictly necessary – that at such installations bishops or ministers exercising *episkopé* in sister churches within the Lutheran World Federation or other denominations are present and assist in the laying on of hands.

In both TEC and the ELKB, these ministries of *episkopé* are therefore exercised personally, collegially and communally.^[18] Bishops share the exercise of *episkopé* with the synodical structures of the church. Ministers exercising *episkopé* constitute “a supra-congregational form of ordained ministry for the sake of spiritual discernment and leadership.”^[19] In both churches, clergy are ordained only by ministers who exercise *episkopé*: the diocesan bishop or *Landesbischof*, suffragan or regional bishops.

Together with the LWF’s Lund Statement, *Episcopal Ministry within the Apostolicity of the Church*, TEC and the ELKB affirm that these forms of *episkopé* are intended to preserve the apostolic nature of the church and to interpret it for today. Through these structures of *episkopé*, the church “exercises responsibility for its doctrine and practices through open, critical deliberation and transparent ecclesial processes.”^[20]

TEC and the ELKB affirm also with the *Lund Statement* that a bishop not do so does his/her in isolation: “together with teachers of theology, pastors in congregations, persons called to a ministry of education and committed lay persons, episcopal ministers [i.e. ministers exercising *episkopé* – ed.] are especially called to judge doctrine in the life of the church, and to reject teaching that is contradictory to the gospel. The responsibility of governing bodies in the church (parish councils and church synods) is also to take formal decisions to ensure that the institutional, practical life of the church is in good keeping with the message of the gospel and witnesses to it.”^[21]

In the words of the Anglican Bishops’ *Appeal to All Christian People* (1920), TEC and the ELKB affirm that both churches have maintained and been served by an ordained ministry truly faithful to the gospel, and that the ordained ministries of both churches have always been, and continue to be, “manifestly blessed and owned by the Holy Spirit as effective means of grace”.^[22]

The four articles of the Anglican *Chicago-Lambeth Quadrilateral* (1888) remain the foundation for Anglican/Episcopal ecumenical relations. Anglicans and Lutherans have long agreed on its first three articles which affirm the foundational nature of Holy Scripture, the sacraments of baptism and the Eucharist, and the Apostles’ and Nicene Creeds. The Quadrilateral sets out as the fourth basis for church unity: “the historic episcopate, locally adapted in the methods of its administration to the varying needs of the nations and peoples called of God into the unity of [God’s] Church.”^[23] TEC and the ELKB affirm that in both churches, *episkopé* is exercised in a form that is congruent with this article.

With the *Meissen Agreement*, TEC and the ELKB “acknowledge that personal and collegial oversight (*episkopé*) is embodied and exercised in [their] churches in a variety of forms, episcopal and non-episcopal, as a visible sign of the Church’s unity and continuity in apostolic life, mission and ministry.”^[24] However, the ELKB and TEC can go further than the Meissen

Agreement: on the basis of the congruence in their understanding and practice of *episkopé* and synodical government TEC and the ELKB are able to enter into a relationship of full communion, with interchangeability of ordained ministries.

Continuity in the Gospel: Historic and evangelical succession

For both TEC and the ELKB, continuity in the proclamation of the gospel is of primary importance in establishing the apostolic character of the Church. This is preserved through “succession” However, the focus of the term “succession” is different in the traditions of the two churches.

Within TEC succession is understood as the orderly succession of bishops ordained by their predecessors as integral to the preservation of apostolic continuity in the proclamation of the gospel. This represents an episcopal tradition which can be traced to the ancient church, in which bishops already in this succession maintain the integrity of the faith by ordaining newly elected bishops with prayer and the laying on of hands.^[25] TEC, like all the churches of the Anglican Communion, asserts that its bishops stand in historic succession understood in this way, through the consecration of new bishops through prayer and laying on of hands by at least three existing bishops. Acknowledging this background, Anglicans have still recognized in their previous agreements of (full) communion that the apostolic faith is preserved, not exclusively through the succession of bishops, but by the whole church, that is, also through the ministry of priests and deacons and of the whole people of God.

The ELKB understands succession in terms of the continuity of this apostolic faith, rooted in the proclamation of the gospel and supported by the ordained ministry. As expressed in the Augsburg Confession (art. 7), the Reformation emphasized the church as evangelical, established through the continuous preaching of the gospel and the celebration of the sacraments. This is the basis of the apostolic succession. The Augsburg Confession (art. 14) teaches that “no one should publicly teach in the Church or administer the Sacraments unless properly called.” Commenting on this, Article 14 of the *Apology* (1531) affirms the Lutheran commitment to “willingly retain ecclesiastical and canonical order”. Luther and other Reformers worked to ensure that structures were put in place to maintain the true preaching of the gospel and celebration of the sacraments. These structures have always included forms of oversight such as superintendents and visitations. Through and since the Reformation, this continuity in local structures has therefore been associated with a conscious conviction that apostolic teaching and faith must be not only rediscovered but also preserved. Those involved in oversight are installed through prayer and the laying on of hands.

Both TEC and the ELKB therefore recognize, as affirmed by *Called to Common Mission*, that in the context of the ordained ministry and the ministry of the whole people of God both churches “value and maintain a ministry of *episkopé* as one of the ways ... in which the apostolic succession of the church is visibly expressed and personally symbolized in fidelity to the gospel through the ages.”^[26]

In moving forward together, TEC and the ELKB commit to share an episcopal succession that is both evangelical (true to the gospel) and historic (true to tradition), including regularly a bishop of the other church to participate with at least two other ministers exercising *episkopé* in the laying on of hands at the ordinations/installations of their own bishops as a sign of the unity and apostolic continuity of the whole church.^[27] TEC and the ELKB believe that the fullness of the apostolic tradition preserved in each church will deepen as a result of the relationship of full communion, through the shared ministry of bishops and presbyters and of the whole people of God.

TEC and the ELKB share congruent understandings of *episkopé*, but this does not commit the two churches to a unified concept of the office of bishop. TEC and the ELKB acknowledge that there is a diversity of how the office of bishops is lived out in each church. TEC and the ELKB affirm that the fact that the liturgy of introducing bishops into office can be understood as installation or as ordination, or that tenure in office may vary, or that the status of bishops when they leave office may differ does not hinder us entering into full communion.

In order to demonstrate more clearly the shared nature of the *episkopé* exercised by bishops, both churches commit to ensuring that at the ordination/installation of bishops, the whole church be visibly present through the involvement of lay people as assistants in the ordination/installation and to working to include in their installation/ordination rites an affirmation that the bishop will exercise *episkopé* in conjunction with the synodical government of the church.

Each church remains free to explore its particular interpretation of the ministry of bishops in evangelical and historic succession. This should be done in consultation with one another. Each church maintains and can enter into relationships with other churches, including relationships of (full) communion, which do not oblige the other church to engage in that relationship. That is, this declaration of full communion does not imply automatic communion of the one church with the communion partners of the other church, although each church is encouraged to seek communion with the churches with which the other is in communion.

Recognizing one another as churches that truly preach the gospel and duly administer the holy sacraments,^[28] TEC and the ELKB receive with thanksgiving the gift of unity which is already given in Christ. Christians have repeatedly echoed the scriptural confession that the unity of the church is both Christ's own work and his call to all Christians. It is the task of the churches, and of all Christians, as well as Christ's gift. Every Christian – and every church – must “make every effort to maintain the unity of the Spirit in the bond of peace” (Ephesians 4:3), praying that they may rely upon, and willingly receive from one another, the gifts given by Christ through his Spirit “for building up the body of Christ” in love (Ephesians 4:16).

As TEC and the ELKB, we do not know to what new, recovered, or continuing tasks of mission this relationship of full communion will lead our churches, but we give thanks to God for leading us to this point, and entrust ourselves to that leading in the future, confident that our full communion will be a witness to the gift and goal already present in Christ, “so that God may be all in all” (1 Corinthians 15:28).

Actions and Commitments

We, The Episcopal Church and the Evangelical Lutheran Church in Bavaria, declare ourselves to be in full communion. Together,

- a. We commit ourselves to continue and deepen our common life in mission and service, to pray for and with one another and to share resources as appropriate in Bavaria, recognizing that TEC is a very small minority there. We encourage regular collaboration and consultation among members of our churches at all levels as appropriate.
- b. We commit ourselves to offer sacramental and pastoral ministry to members of one another's churches.
- c. We commit ourselves to receive those who formally leave one church to move to the other with the same status (for example baptized, communicant, confirmed) that they held in their previous church.

The declaration of full communion between our two churches implies the immediate recognition of currently serving ministers of the one church by the other. TEC fully recognizes the ordained ministry of bishops and pastors currently existing within the ELKB, acknowledging its pastors as ordained ministers in the Church of God and its bishops and regional bishops as bishops exercising a ministry of personal *episkopé*. Likewise, the ELKB fully recognizes the ordained ministry of bishops and priests currently existing within TEC, acknowledging its priests as ordained ministers in the Church of God and its bishops as bishops exercising a ministry of personal *episkopé*.^[29]

With full communion, interchangeability of ministries is given. We therefore commit ourselves to welcome persons ordained in either of our churches to the office of priest/pastor to serve, by invitation and in accordance with any regulations which are in force, in that ministry in the receiving church without re-ordination. We affirm that bishops may be invited to carry out in the other church, as appropriate, those ministries which they exercise in their own, such as confirmation.

We commit ourselves, as a sign of the unity and continuity of the Church, to invite one another's bishops regularly to participate in the laying on of hands at the installation/ordination of bishops, with the expectation that a bishop from the other church will be present at the ordination of the bishop of the Convocation and the installation of the *Landesbischof*,

one another's pastors and priests to participate in the laying on of hands at the ordination of pastors or priests in one another's churches;

one another's lay people, including both those who share in the exercise of *episkopé* and members of local congregations, to participate in our churches' ordinations/installations in ways which celebrate the ministry of the whole people of God.

Such mutual invitations are understood as a call for the deepening of the lived experience of our communion.

We commit ourselves also to continue our practice of inviting representatives of other churches, representing the worldwide church, to participate at the installation/ordination of bishops.

We commit ourselves to ensure that at the ordination/installation of bishops, the whole church be visibly present through the involvement of lay people as assistants in the ordination/installation and to work to include in our installation/ordination rites an affirmation that the bishop will exercise episkopé in conjunction with the synodical government of the church.

We commit ourselves to invite a representative of TEC to attend the synod of the ELKB and a representative of the ELKB to attend the Convention of the Convocation of the Episcopal Churches in Europe, and to keep one another informed about developments in our two churches.

We commit ourselves to establishing a small continuation committee which for at least seven years will undertake regular (at least annual) consultation regarding our relationship, will initiate further work as needed, and can be consulted should any questions or difficulties arise.

Each church agrees that the other church will continue its full communion relationship with all the churches with whom it is already in communion. We encourage one another to seek communion with these churches as well, but recognize that our declaration of full communion does not imply automatic communion of the one church with the communion partners of the other church.

We commit ourselves to work together to proclaim Christ's gospel through word and deed, and to further the unity of the whole of Christ's church, recognizing that entering a relationship of full communion will bring new opportunities and levels of shared evangelism, witness, and service.

Revised November 9, 2020

End Notes

- [1] The ELKB is a party to the Meissen Agreement through the EKD.
- [2] Neither the ELKB nor TEC is a party to the *Porvoo Common Statement*. The signatories of the *Porvoo Common Statement* are, from the LWF: the Evangelical Lutheran Church of Denmark, the Estonian Evangelical Lutheran Church, the Evangelical Lutheran Church of Finland, the Lutheran Church in Great Britain, the Church of Iceland, Evangelical Lutheran Church of Latvia Abroad, the Evangelical Lutheran Church of Lithuania, the Church of Norway, the Church of Sweden; and from the Anglican Communion: the Church of England, the Church of Ireland, the Lusitanian Church of Portugal, the Scottish Episcopal Church, the Reformed Episcopal Church of Spain, and the Church in Wales. The Evangelical Lutheran Church of Latvia has observer status, which is intended to lead to membership. The United Evangelical Lutheran Church of Germany (VELKD), of which ELKB is a part, has the less binding guest status.
- [3] TEC is one of the signatory churches of *Called to Common Mission*.
- [4] Neither the ELKB nor TEC is a party to the *Waterloo Declaration*, but the *Memorandum of Mutual Recognition of Relations of Full Communion* will link the *Waterloo Declaration* and *Called to Common Mission*.
- [5] *Jerusalem Report*, pp. 53.56 [Appendix 3].
- [6] This paragraph adapted from *Called to Common Mission*, §2.
- [7] This paragraph is adapted from the *Waterloo Declaration*, §7, and the *Porvoo Common Statement*, §58(b).
- [8] These points are based on the headings of the *Meissen Agreement*, §8.
- [9] Augsburg Confession, art. 7, translation of the Latin text in Robert Kolb/Timothy Wengert, *The Book of Concord*, 43. Compare also the Thirty-Nine Articles, art. 19.
- [10] *Porvoo Common Statement*, §39.
- [11] *Called to Common Mission*, §7.
- [12] *Called to Common Mission*, §7. The terminology “personal, collegial, and communal” is drawn from the discussion of ministry in *Baptism – Eucharist – Ministry* (WCC Faith and Order Paper 111; 1982), §26.
- [13] *Episcopal Ministry within the Apostolicity of the Church* (The Lund Statement), § 50.
- [14] The *Lund Statement* summarizes these roles as “episcopal ministers”; to avoid confusion, this present statement refers to “ministers exercising *episkopé*”.
- [15] *Called to Common Mission*, §7.
- [16] *Called to Common Mission*, §24.
- [17] This concept of church government was known as the *Landesherrliches Kirchenregiment*.
- [18] See *Baptism – Eucharist – Ministry*, §26.

[19] *Lund Statement*, §4.

[20] *Lund Statement*, §52.

[21] *Lund Statement*. §52.

[22] Lambeth Conference 1920, Resolution 9.vii.

[23] Lambeth Conference 188, Resolution 11.d.

[24] *Meissen Agreement* §VI 17 A iii.

[25] This definition is found in *Called to Common Mission*, §11.

[26] *Called to Common Mission*, §12.

[27] *Called to Common Mission*, §12.

[28] CA VII; 39 Articles Art. XIX.

[29] Deacons are not explicitly mentioned in this agreement. The *Jerusalem Report* of the Third Anglican Lutheran International Commission concluded that the church's expression of its diaconal character is context specific, so that different understandings of and practices with relation to the diaconate are to be expected and are therefore not communion dividing.

TASK FORCE TO DEVELOP CHURCHWIDE FAMILY LEAVE POLICIES

Membership

The Rev. Devon Anderson, <i>Chair</i>	Minnesota, VI	2021
The Rt. Rev. Daniel Gutiérrez, <i>Vice-Chair</i>	Pennsylvania, III	2021
Ms. Sarah Ambrogi	New Hampshire, I	2021
Ms. Barbara Creed	El Camino Real, VIII	2021
The Rev. Canon Alex Dyer	Colorado, VI	2021
Ms. Michael Funston	Kansas, VII	2021
Ms. Kathryn Glover	Maryland, III	2021
The Rt. Rev. Santosh Marray	Easton, III	2021
Ms. Diane Pollard	New York, II	2021
Br. Scott-Michael Pomerenk, BSG	Colorado, VI	2021
The Rev. Lauren Schoeck	Idaho, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

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Laura Russell New York Legal Aid Citywide Director at Hiscock Legal Aid Society Chair, Task Force on Sexism	Terry Smith First Vice President – Consultant American Benefits Consulting

Mandate

2018-Co19 Church-Wide Paid Family Leave Policy

Resolved, the House of Deputies concurring, That the 79th General Convention call upon the Presiding Bishop and President of the House of Deputies to appoint a task force consisting of three (3) bishops, three (3) presbyters or deacons, and six (6) lay persons, who represent the diversity of the Church and having among them applicable human resources policy administration, childbirth, adoption, and care of ill family member experience, either personal or professional, to research and create, in consultation with the Church Pension Group, a proposal for a church-wide paid family leave policy for consideration at the 80th General Convention.

Summary of Work

Executive Summary

Generous and equitable family leave creates both time and space for the nurture and formation of children and families and the care of a sick family member. It is, in all simplicity, a justice issue. On some level, the Episcopal Church (TEC) knows and understands the place family leave holds in the incarnational theology that is the core of our Anglican identity. It understands and affirms that family leave is a justice issue that holds moral and ethical implications for our worshipping communities. We know this because over the past 35 years, starting in 1985, General Convention has entertained six separate resolutions concerning, and advocating for, family leave. None of the resolutions, however, have been successful in establishing a mandatory paid family leave benefit for clergy and lay professionals in the church. The first priority of the Task Force to Develop a Mandatory Paid Family Leave Policy (TFPFL) was to figure out why.

The TFPFL's process was careful, intentional, and steady. We spent the first year of the triennium researching every possible aspect of family leave. After exhaustive inquiry, TFPFL came to collectively understand why, after 35 years, TEC still does not have mandatory paid family leave for clergy and lay professionals. Through our research it became clear that without: a federal law mandating paid leave for all states; options for any available insurance products; financial and administrative resources for many dioceses and most congregations to bear the weight alone and administer a family leave program by themselves – the TFPFL would not be able to fulfill entirely the mandate to come back to the 80th General Convention with a comprehensive, mandatory, paid family leave policy for TEC.

The Task Force opted instead for incremental progress, moving our church closer to achieving the ultimate goal of mandatory, paid family leave for all clergy and lay professionals in three ways:

- Providing detailed, accurate, and exhaustive research so that TEC need not form additional task forces to study this issue;
- Writing and successfully navigating a resolution through Executive Council enabling the Office of Governmental Affairs to advocate for a federal mandatory, paid family leave law; and
- Developing model plan designs for paid family leave, with three levels of 12 policy variables (such as eligibility, duration, qualifications, reasons for leave, etc.) that assume parity between clergy and laity, to serve as a resource for dioceses and congregations who elect to offer this benefit, and as a comprehensive template for insurance products in the (hopefully near) future.

The TFPFL is indebted to the Church Pension Group for supporting our work in multiple ways, including securing a trusted consultant to work alongside us in developing the family leave model plan designs. With gratitude, we honor CPG for its enduring patience and gentle guidance throughout the triennium.

Summary of Work

The TFPFL first convened in an online meeting on March 5, 2019, and over the triennium met 14 times, including a two-day meeting which was to have been in person but, due to COVID, happened online. We began our work by sharing our perspectives, experiences, passion, and opinions about the task ahead: to spend a triennium developing a mandatory, paid family leave policy for the Episcopal Church. Recounting our own stories as well as those of friends, family, and church colleagues, it became clear that our intent was to honor all families who make up our church in a very practical, tangible way by financially providing for them while they take time to care for a new family member in his/her/their first weeks and months of life, the oldest family members in their final weeks of life, and those in between.

The TFPFL recognized family leave as a multi-layered, complex, intricate issue and spent the first year of its work researching every possible aspect and nuance. First, we consulted widely with advocacy groups, municipal and commercial benefits brokers, insurance companies, religious organizations with family leave policies, including:

- Cigna (industry Power Point: “Family Leave: What Every Employer Should Think About”)
- National Partnership for Women and Families (“Fact Sheet,” “State Paid FML Insurance Laws,” “Paid FML: An Overview”)
- The Center for Integrity in Business & The Center for Public Justice (“Family-Supportive Practices in the Sacred Sector”)
- Commission on Social Action of Reform Judaism
- The Church of Jesus Christ of Latter-Day Saints
- Anglican Church of Canada, employee handbooks of dioceses with family leave policies

Next TFPFL met in-person/virtually with consultants, advocates, and industry leaders, including:

- Vicki Shabo, Senior Fellow, Paid Lead Policy & Strategy, Better Life Lab, New America
- Rebecca Linder Blachly, Director, Office of Government Relations, The Episcopal Church
- Laura Russell, Citywide Director, New York Legal Aid Society
- The Executive Council’s Committee on Governance and Operations
- Church Pension Group (Clayton Crawley, John Servais)
- Terry Smith, First Vice President, American Benefits Consulting

The TFPFL also reached internally, into the Episcopal Church, for a fuller picture of existing family leave practices and policies, including:

- A poll of young parents within TEC to collect stories, narratives, and experiences of sufficient family leave (or lack thereof) for clergy and lay professionals;
- An informal poll of dioceses within TEC that have any form of family leave policy;
- A survey of 5 Episcopal Seminaries and their family leave policies (if applicable);
- Conversation with TEC dioceses not in the United States; and
- A comprehensive research project to map out the history of family leave resolutions at General Convention (initiatives, debate, reports, and outcomes).

Finally, an informal poll was conducted to discern forms of paid family leave offered in TEC dioceses located outside the United States, primarily dioceses in Province 9 and Cuba. This investigation revealed that each of these dioceses has a limited program specific to their own needs. In cases where some limited benefit exists, it is focused specifically on maternity/paternity leave --coverage that is mandated by the local government. Where these benefits are accessible, whether paid and/or time off for family care, it is comparable to, or better than, many states or diocesan jurisdictions within the United States. Our research uncovered two critical findings: (1) There is a wide disparity of benefits and programs within the United States and within Province 9. The benefits also contrast to those provided by the Convocation of Episcopal Churches in Europe; and (2) Coverage is essential for

all parents, as it was identified by those interviewed as necessary and demonstrative of our call to care for one another.

All reports, survey and poll results, and interview transcripts can be made available to the relevant legislative committee and/or any bishop or deputy of the 80th General Convention upon request.

At the end of our first year, we possessed a deeper, more mature appreciation of the complexity and complication of family leave policies. Mid-triennium, the TFPFL took a breath and assessed our path forward. From our research we faced what we felt were insurmountable barriers to developing a TEC mandatory, paid family leave policy, for the following reasons:

- There is no current federal law mandating paid family leave across the board; benefits are available only on a state-by-state basis; as of November 2020, only 8 states have mandatory paid family leave laws.
- There are currently no insurance products available in the marketplace for family leave, so employers must bear the full risk of the cost of these programs.
- Paid family leave programs can be extremely and prohibitively costly for an employer such as a church or a diocese.
- Paid family leave programs are administratively complex, especially for employers like TEC where no centralized payroll or Human Resources systems exist. Administrative necessities for family leave policies include: policy development and maintenance, manager training, education and plan roll-out, and record keeping.

Given these challenges, the TFPFL changed course. After consulting with our Presiding Officers, we shifted our strategic focus to bringing about incremental change, meaning helping TEC move closer toward the ultimate goal of mandatory, paid family leave for all clergy and lay professionals. The decision was not made lightly, and we dealt with our collective disappointment in not being able to fully deliver what the 79th General Convention had asked us to do. We understand, and heartily agree with, the church's passionate desire for family leave for all of the equity, justice, theological, moral, ethical, and spiritual reasons. Simply, it's the right thing to do. And the church needs it. The Task Force just could not find a way to overcome the barriers – all the challenges that would have to be overcome in order for any viable resolution to make its way out of legislative committee and onto the floors of the House of Deputies and House of Bishops for consideration, debate, and vote. In mid-triennium, we found ourselves exactly where past interim bodies and General Convention legislative committees had stalled themselves.

In the name of incremental, steady change toward the ultimate goal, the TFPFL took on two initiatives:

- An enabling resolution to equip the Office of Governmental Relations to be able to advocate for national mandatory, paid family leave legislation (several bills have been introduced in Congress); and
- In-depth model plan designs for family leave policies – for permissive, not mandatory, use at the diocesan level, and as a complete template that can be provided to insurance companies as a directive to what TEC wants and needs when products begin to be developed.

On February 14, 2020, the Executive Council approved the following resolution (MW019):

Resolved, That the Executive Council, meeting in Salt Lake City from February 13-15, 2020, affirms the teaching that the birth or adoption of a child is a cause of celebration for parents, family and the entire community and that an entire community has responsibility for supporting a family in raising a child; and be it further

Resolved, That we recognize the federal government has a responsibility to establish minimum standards of living for all people, including access to food, housing, and healthcare; and be it further

Resolved, That we call on the federal government to establish and provide a funding mechanism for new parents to take parental leave to care for their child, recognizing the benefits to the child, parents, and community; and be it further

Resolved, That we call on the Office of Government Relations to advocate to the Congress for the establishment of a paid family leave program, in particular for workers who do not have access to paid leave from their employers.

The TFPFL recommends, as well, that General Convention consider and approve resolution A003 Uniform Paid Family Leave Policy, which is included in this report.

In May 2020, the TFPFL contracted with Terry Smith, a consultant with American Benefits Consulting, to work with a subgroup of the Task Force to develop multi-tiered, model plan designs for family leave. Smith was referred to the TFPFL by the Church Pension Group and is a trusted, reliable guide with whom CPG has worked for years. Again, we are grateful to CPG for helping locate the consultant and bear some of the cost. Once again, CPG proved itself to be an invaluable and faithful partner in our mission. Over the summer months, the team developed bronze, silver, and gold model

plans for family leave, designing a “matrix” of 12 mix-and-match plan provisions. Additionally, the model plan identifies a series of “decision points” that any diocese or congregation hoping to use the matrix to design a plan for itself would need to grapple with, including cost burden, parity between clergy and lay professionals, cost analysis, and administration considerations.

During the development of the model the Task Force spent considerable time exploring and discussing the benefits of a centralized payroll system within TEC for administering programs such as family leave. In the end, we decided not to take on this initiative as we felt it went beyond the scope of our enabling resolution.

And finally, a word about terminology. The TFPFL’s enabling resolution specified our work and focus on family leave, as opposed to family and medical leave, or parental leave. The term “family leave” is more expansive than “parental” leave in that it encompasses the care and nurture of a child at the time of birth or adoption, as well as caring for a family member for whom the individual is the primary caregiver – whether partner, spouse, child, sibling, parent, grandparent, etc. when the physical or mental health of the family member is such that they are no longer able to care for their basic daily needs (feeding, bathing, dressing themselves) but must rely on another person(s) to provide that care. Family leave is different from medical leave in that paid medical leave indicates leave for self-care during your own serious illness. Paid medical leave has been available for decades in five states.

A glossary of terms is available to the relevant legislative committee and/or any bishop or deputy of the 80th General Convention upon request.

Theological Rationale

Our call and imperative, as followers of Jesus Christ, is to ground the decisions and choices we make for the church in our common theology. The incarnation lives at the core of Anglican identity and theology. The word incarnation means “enfleshment,” rooted in the Latin “carnis,” meaning “flesh.” Jesus was fully human and fully divine, the Son of God in the flesh. From our earliest formations, the Christian church has professed incarnation, Jesus as “truly God and truly man... in two natures, without confusion, without change, without division, without separation...” according to the Council of Chalcedon in 451 (Book of Common Prayer, p.864). What the incarnation means for us today is this: through Jesus, God is revealed to us in the physical and temporal things of everyday life. Through Jesus’ earthly life, teaching, and sacrificial love, we come to see God in our own earthly lives, in the quotidian circumstances of human interaction, relationship, challenge, heartbreak, conflict, and joy. The gift of paid family leave – the chance to care for an infant or child new to the

family, the opportunity to care for a sick family member, the ability to step away from one's professional occupation in order to minister to the needs of loved ones without loss of income or security – is rooted in our incarnational theology. Through it we have the chance to focus entirely on the nurture of relationships, to discover God anew in the space between people, and live more fully into Jesus' commandments to love one another.

One of the seven components of the Episcopal Branch of the Jesus Movement's Way of Love is "rest." While no one ever will describe family leave to care for a new child or infant to the family or nurse a sick family member as a vacation or a long period of rest, family leave does afford individuals the opportunity to leave behind, for a time, the concerns, anxieties, and deadlines of their paid work to focus that energy on the care of family. This time creates the possibility that the family, in whatever its precise circumstance, can enjoy the fullness of time together in all its parts – work and rest, worship and prayer, blessing and forgiveness. Family leave creates space in time. In his seminal book, "The Sabbath," Abraham Joshua Heschel writes, "...labor is the means toward an end, and the Sabbath as a day of rest, as a day of abstaining from toil, is not for the purpose of recovering one's lost strength and becoming fit for the forthcoming labor. The Sabbath is a day for the sake of life... It is not an interlude but the climax of living." (p.14). Creating space in time to nurture our families is not a break or a vacation, but the very essence of living.

Further, the family unit is understood, in both our Hebrew and Christian scriptures, as the central and sacred entity in which we teach and learn and grow deeper in our faith, with which we worship God and follow Jesus. Deuteronomy 11:18-19 reminds us: "You shall put these words of mine in your heart and soul, and you shall bind them as a sign on your hand and fix them as an emblem on your forehead. Teach them to your children, talking about them when you are at home and when you are away, when you lie down and when you rise." Similarly, in the Litany of Ordinations found in our Prayer Book: "For his/her family [the members of his/her household or community] that they may be adorned with Christian virtues." (Book of Common Prayer, p.549). Family leave is a practical, accessible way to strengthen the family unit, to care and nurture it so that it remains intact, strong, and focused in its capacity to grow and nurture the faith.

The gift of paid family leave roots us, deeper and more firmly, in our incarnational theology, in the Way of Love, and in our scriptural tradition. Through it, we can live more faithfully into what we profess to believe, and the Way of Jesus we follow.

History of resolutions

For over 35 years The General Convention of the Episcopal Church has been considering resolutions from various committees and interim bodies to establish what is now referred to as Church-Wide Parental Leave Policy and Practices. Resolution 1985-D083 from the 1985 General Convention urged dioceses “to include a policy for maternity/parental leave in conjunction with its personnel policies for sick leave, annual leave, leave with and without pay, and disability pay for its lay and ordained employees.” Six years later resolution 1991-D111 from the 1991 General Convention requested that dioceses report to the Executive Council on the status of their implementation of resolution 1985-D083; the resolution also included a request for the Church Pension Fund to inform each diocese of their income replacement policy. The 2000 General Convention received resolution 2000-C042 from the Committee on Ministry that provided additional details to include in their policies concerning clergy maternity/paternity leave. The resolution reads as follows:

Resolved, That the 73rd General Convention urge the Executive Council and all dioceses to include the following in their policies concerning clergy maternity/paternity leave:

- A member of the clergy who has been employed by the church for one full year and is the designated "primary child-care parent" is entitled to leave for the birth or adoption of a child for a minimum of eight weeks with pay. Up to eight additional weeks may be taken without pay. The member of the clergy may elect to use vacation leave or sick leave during this latter period.
- A member of the clergy who has been employed by the church for one full year and is the "non-primary care parent" is entitled to leave for the birth or adoption of a child for a minimum of two weeks with pay and up to ten additional weeks without pay.
- A member of the clergy not employed by the church for one full year is entitled to the same numbers of weeks leave. Pay during this period is negotiated between the employer and the member of the clergy.

It was not until 2009 that an Act of General Convention 2009-A166 articulated “the importance of family in the life of clergy and laity employed by the Church” and yet language of the resolution remained one of urging dioceses and congregations to establish policies for employee parental leave for clergy and laity in cases of both birth and adoption “consistent with local employment laws and generous industry standards.”

It would be another 6 years until the 78th General Convention as part of resolution 2015-D030 directed “the Executive Council in consultation with the Church Pension Group to prepare a church

wide model policy on parental leave for both birth and adoptive parents for consideration by the 79th General Convention.”

In 2018 again the General Convention urged “every diocese to review such model policies and to implement comprehensive policies on family leave that fit their respective needs” as part of resolution 2018-A223. However, as part of resolution 2018-C019 the Episcopal Church took a step towards establishing churchwide policies and away from diocesan level policies by calling upon the “the Presiding Bishop and President of the House of Deputies to appoint a task force... to research and create, in consultation with the Church Pension Group, a proposal for a church-wide paid family leave policy for consideration at the 80th General Convention.”

Plan Design and explanatory text

The Episcopal Church is interested in exploring the feasibility of offering a Paid Family Leave (PFL) benefit to its clergy and lay employees. PFL programs are very popular with private sector and public sector employers and they play an important role in employee attraction and retention strategies. Several states have mandated PFL programs that employers must offer and there is significant additional PFL mandate legislative activity at both the state and local level. PFL programs can be costly and administration can be complex, especially for employers like the Episcopal Church where no centralized payroll and Human Resource systems exist. PFL programs are funded by employers and there are no insurance products in the marketplace, so employers bear the full risk of the cost of these programs. In practice the cost of a PFL plan can be material and the implementation of a new plan should be carefully thought out from an expense perspective. Employers typically create a PFL line item in their annual benefits budget to recognize the expense rather than treating the expense as a payroll cost. Annual PFL benefit expense growth is typically aligned with underlying compensation growth once plan utilization stabilizes.

To date insurance companies are reluctant to take on the administration of an employer’s PFL plan due to administrative complexities, so most employers rely on the benefits and payroll departments for administration needs. In some cases, decentralized payroll systems and a lack of internal staff to manage a PFL program have been barriers to the launch of a successful program.

We have developed three model PFL plans which include varying degrees of plan value as shown in the following table.

The table should be read by row and not by column. The final Church plan design will likely contain provisions that are selected from each of the three model designs (bronze, silver, platinum). These Model Plan Designs address Paid programs. They do not preclude an employer from offering

additional unpaid leave which can be coordinated with the paid portion of a leave. For purposes of this table “Eligible Individuals” includes clergy and lay employees.

Model Plan Designs

Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
Eligible Individuals	All clergy and lay employees after 1 year of service. If an eligible individual resigns and returns to the Church a new 1 year waiting period must be satisfied.	All clergy and lay employees after 6 months of service. If an eligible individual resigns and returns to the Church within 6 months, the eligible individual’s prior service will be bridged and counted towards their eligibility.	All clergy and lay employees as of Date of Hire
Duration of Paid Leave (rolling 12 months or calendar year)	6 weeks paid	12 weeks paid	16 weeks paid
Benefit as a % of covered weekly earnings	70% (this aligns with the STD plan)	100% for 3 weeks then 70% for balance of the leave	100% for the duration of the leave
Qualified family members	Eligible family members include spouses, domestic partners (same and opposite sex), children under 18 years of age or if 18 years of age or older and “incapable of self-	Eligible family members include spouses, domestic partners (same and opposite sex), children under 18 years of age or is 18 years of age or older and “incapable of self-care	Eligible family members include spouses, domestic partners (same and opposite sex), children under 18 years of age or is 18 years of age or older

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Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	<p>care because of a mental or physical disability”, parents, grandparents, grandchildren and siblings. It does not include other family members not stated above.</p>	<p>because of a mental or physical disability,” parents, grandparents, grandchildren and siblings. The plan sponsor can also identify other eligible family members by description such as cousins, aunts, uncles, etc. but not by specific named people.</p>	<p>and “incapable of self-care because of a mental or physical disability,” parents, grandparents, grandchildren, siblings. The plan sponsor can also identify other eligible family members by description such as cousins, aunts, uncles, etc. but not by specific named people.</p> <p>Others as identified by the eligible individual who depend on the eligible individual for support or assistance.</p>
<p>PFL usage rules for Paid Parental Bonding and Paid Caregiver leave</p>	<p>Usage rules vary based on the nature of the leave:</p> <p>Paid Parental/Bonding Leave: PFL can be taken to bond with a new child all at once, or it can be taken in 2 blocks of time (defined as any block of continuous calendar days). Qualified bonding leaves must be started and concluded no later than one year after the birth, adoption, or placement of the child</p> <p>Paid Caregiver Leave: PFL can be taken to care for a family member with a serious health condition all at</p>		<p>Usage rules vary based on the nature of the leave:</p> <p>Paid Parental/Bonding Leave: PFL can be taken to bond with a new child all at once, or it can be taken in full day increments. Qualified</p>

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Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	<p>once, or it can be taken it in minimum one day increments. A one-day increment is defined as the regular hours an eligible individual is scheduled to work for a given day. For most eligible individuals, a one-day increment will be 8 hours. However, one day for a part-time eligible individual may equate to 6 hours if this represents a scheduled work day.</p>		<p>bonding leaves must be started and concluded no later than one year after the birth, adoption, or placement of the child</p> <p>Paid Caregiver Leave: PFL can be taken to care for a family member with a serious health condition all at once, or it can be taken it in minimum 4 hour increments.</p>
<p>Coordination with local and State mandated programs</p>	<p>Runs concurrent with mandated programs</p>		<p>Runs consecutive to mandated programs</p>
<p>Multiple reasons for PFL leave</p>	<p>Eligible individuals are limited to 6 weeks of PFL during a 12-month calendar year period. If an eligible individual exhausts their PFL to bond with a new child, they would not be eligible for additional</p>	<p>Eligible individuals are limited to 12 weeks of PFL during a 12-month calendar year period. If an eligible individual exhausts their PFL to bond with a new child, they would not be eligible for additional</p>	<p>Eligible individuals are limited to 16 weeks of PFL during a 12-month calendar year period. If an eligible individual exhausts their PFL to bond with a new child, they would not be eligible for</p>

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Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	time off under this policy to care for a family member with a serious health condition if it is within the 12-month period	time off under this policy to care for a family member with a serious health condition if it is within the 12-month period	additional time off under this policy to care for a family member with a serious health condition if it is within the 12-month period
Rules that apply when both parents work for the same employer	Each eligible individual will be allowed to take Paid Family Leave under this policy. However, there may be circumstances where both eligible individuals cannot take the same period of time off work unless special approval is received from the applicable Personnel Manager.		
Job protection while on leave	Yes		
Definition of covered weekly earnings	CPG STD/LTD plan “Covered Weekly Earnings” definition: means the member’s gross weekly rate of earnings from the employer plus the weekly rate of any housing and utility allowance received from the employer by the covered person. However, such earnings will not include income received from commissions, overtime pay or any or any other extra compensation or income received from source other than the employer other than income actually received from bonuses. Earnings will be based on the annual earnings just prior to the date of disability.		
Definition of a parent for bonding leave	Parents include one of the following relationships to the new child: biological mother, biological father, a spouse/domestic partner of a biological mother or father, or a newly adoptive or foster care parent		
Qualified reasons to take a PFL leave	Paid Family Leave allows an eligible individual to take time off from work to care for an eligible family member with a serious health condition, or for a parent to bond with a new child entering the family through birth, adoption, or foster care placement		

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Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	<p>A serious health condition is defined as an illness, injury, impairment, or physical or mental condition requiring inpatient care in a hospital, hospice, or residential medical care facility, or continuing treatment or supervision by a health care provider For example:</p> <ul style="list-style-type: none"> • Ongoing serious health condition that continues over an extended period of time, patient is seen at least twice per year for treatment by a health care provider, and may cause episodic periods of incapacity • Long-term or permanent period of incapacity due to a condition for which treatment may not be effective and the family member is under continuing supervision of a health care provider • Treatment or recovery from restorative surgery after an accident or other injury, or a condition that would likely result in a period of incapacity of more than three consecutive full days in the absence of treatment • An initial incapacity of more than three consecutive calendar days involving being seen by a health care provider for treatment within the first 7 days of when the incapacity began and 1) seen a second time by the treating provider within 30 days of when incapacity began OR 2) a regimen of continuing treatment under the supervision of the health care provider 		
<p>Required documentation to submit a Leave Request</p>	<p>In the discretion of the employer/administrator, these items may be required:</p> <p>Paid Parental/Bonding Leave:</p> <ul style="list-style-type: none"> • Hospital record showing the child’s birth • Hospital generated birth certificate/record • Child’s birth certificate • Child’s hospital discharge record • Foster Care Placement Record 		

Plan Provision	Bronze Plan	Silver Plan	Platinum Plan
	<ul style="list-style-type: none"> • Adoptive Placement Agreement • Child’s passport showing immigration and naturalization service stamp • Footprints the hospital provide parents so long as a DOB is included <p>Paid Caregiver Leave: A certification form that is similar to the Federal Family and Medical Leave Act (FMLA) certification form</p>		

Plan Design Component Selection Decision Point

The PFL program is designed to be implemented at the Diocesan level with parity in design and administration between clergy and lay employees. Each Diocese will decide if it will allow individual churches to adopt plan design variations within the permitted levels of the program. The plan design selection should be made based on the cost of the programs and the administration requirements of the programs.

Plan Funding Decision Point

Each Diocese must decide whether the cost of the PFL program will be paid at the individual church level based on utilization of that church’s clergy and employees, or whether the Diocese will assess all churches in the Diocese a flat amount to be pooled and used to reimburse individual churches for the cost of PFL usage. To accomplish the latter, a Diocese would have to do a cost study based on the PFL program selected and the demographics in the Diocese. See below for a further discussion of calculating plan costs.

Model Plan Design Cost Analysis

In order to calculate the annual cost of a PFL plan, demographics, leave of absence, disability and healthcare data is used along with a series of assumptions. The analysis includes a projection of which eligible individuals would take PFL time for what reasons, for how long and at what salary. For instance, eligible individuals who are beyond child bearing years are not expected to take a bonding leave but may very well take a leave to care for an ill family member, and they may be more highly compensated than a younger eligible individual, but the duration of the leave may be shorter than a typical bonding leave duration. Further they may be apt to take the leave intermittently whereas a bonding leave is more frequently taken on a continuous basis. If siblings, grandparents, grandchildren and/or “significant others” are included as eligible family members the cost analysis is complicated because estimations would have to be made on how many of these eligible family members exist and might have a condition that requires care resulting in a PFL leave.

Most employers who are interested in conducting a cost analysis employ the services of a consulting firm due to the complexity of the analysis and the assumptions that factor into the calculations. The consulting firm issues data requests to the employer, the disability vendor and the healthcare provider. Healthcare data is focused on the number of births and major dependent surgical procedures.

The demographic data request includes the following:

- Employee identifier
- Gender
- Date of birth
- Date of hire
- Annual compensation (base, bonus, housing allowance, other)
- Work state
- Salaried/Hourly class
- Full-time/Part-time status

The leave and disability data request includes the following with subscriber IDs that align with the demographic file employee identifier:

- An Excel file of all medically related absences for the most recent 24 months including diagnosis

- Detail of any other employer sponsored medically related and non-medically related leave of absence data
- An excel file of all STD claims incurred for the most recent 24 months

The healthcare data request includes the following with subscriber IDs that align with the demographic file employee identifier:

- Dependent maternity delivery claims including a subscriber ID that aligns with the demographic file employee identifier
- Dependent claims that warrant referral to the healthcare plan case management function
- Dependent claims that are referred to stop loss carriers for plan reimbursements
- Dependent claims that contain other severe diagnoses and expected long recovery times

The output of the plan analysis should include a range of cost estimations for the new PFL plan expressed on a per eligible individual per year basis. The cost can be broken down by expected claim costs and expected program administration costs. The range of costs should be based on projected low, medium and high utilization rates which will show best case costs, worst case costs and an average of the two.

The analysis output should include a list of all assumptions that were used in the cost analysis. First year cost estimations of a new PFL program are the most difficult to make. Once the plan is in effect for at least a year future cost projections can be fine-tuned, and utilization patterns will emerge which will allow for more exacting future year cost estimations.

We declined to attempt to create a sample cost calculation for a hypothetical Diocese, because we believe it would not be helpful and might actually be misleading.

Plan Administration Considerations

The vast majority of PFL plans are internally administered on a centralized basis via a combination of Human Resources, Benefits, Payroll and IT efforts. In some cases, employers have co-sourced the administration of the program by retaining their leave and disability carrier for certain plan administration functions.

The administration of a PFL plan includes:

- **PFL Policy development and maintenance:** A clearly written, comprehensive policy is required especially for new PFL programs. The policy should include all of the Plan Provisions that are included in the Model PFL Designs. The policy should address compliance with legislated local and state leave laws and how the PFL policy coordinates with these legislated programs. All policies should be reviewed by local counsel to ensure compliance with local law. The policy will serve as a basis for communicating the plan to participants and managers and it will be relied on for dispute resolution. Consultants are commonly asked to draft policies and there are also many policy examples in the public domain that an employer can use as a starting point if they opt to draft their policy with no consulting support.
- **Manager training:** Managers and supervisors will have to be trained on the mechanics of the PFL program as plan participants typically turn to their managers for advice on how the program works. This training can be delivered via recorded video sessions, in person training sessions and most commonly via a Manager Tool-kit which should include the Policy, all application forms, FAQs, payroll and HRIS system coding requirements, examples of how the plan would apply in specific circumstances such as bonding vs. care of an ill family member, guidance on contact with eligible individuals while they are on leave, employer computer network access while on leave, etc. Employers tend to prefer the tool-kit approach since all information is housed in one location and new manager training can be conducted via a review of the contents of the tool-kit. Depending on the administration model that is developed, managers may also find themselves responsible for a quasi-customer service function. Plan participants will invariably have questions about the program both before taking a leave and while on leave and many of these questions may involve pay related issues. Some employers rely on a centralized program management function for customer service issues. Since the Church does not have a centralized HR function it would make sense to have local managers involved in managing participant questions.

- **Education and plan rollout:** Employee education includes the development of communications material and it can include many of the documents included in the manager tool-kit. Eligible individuals will have to be introduced to the new benefit and most employers take advantage of the opportunity to both educate eligible individuals and to benefit from the good will that comes with the roll out of the new plan. Many of our clients have produced public relations materials as appropriate that coincide with the roll out of the new plan.
- **Record keeping:** Record keeping refers to the actual processing of PFL leave events. This function is typically maintained on a centralized set of payroll and HRIS systems. Eligibility is typically maintained in the HRIS system. The payroll system is used to issue the PFL benefit which may be on a partial day, full day or a full week basis depending upon the usage rules that the Church chooses to implement. The payroll system is also used to “debit” time from an eligible individual’s bank as it is used. The PFL program will necessitate the creation of a new payroll system code that is specific to PFL time taken. In some cases, disability program vendors will provide PFL program administration services although these arrangements are limited to employers with centralized payroll and HRIS systems. External vendors are unlikely to be interested in providing program administration services to clients with decentralized or fragmented systems.

Proposed resolutions

A003 Uniform Paid Family Leave Policy

Resolved, the House of ____ concurring, That the 80th General Convention recognizes the critical importance of the adoption by The Episcopal Church (the “Church”) of a uniform paid family leave policy across the Church, and that this is a justice issue which we are obligated as Christians to address without further delay, and that from the beginning, said policy should provide for parity between lay and clergy employees; and be it further

Resolved, That the 80th General Convention recognizes the difficulties that currently exist with the implementation of a paid family leave policy, given that there is currently no commercial insurance offering available, and therefore, urges all dioceses of the Church to adopt the proposed policy as soon as practicable, in order to be prepared to implement the policy as soon as a commercial

insurance offering becomes available, whether through Church Pension Group or other avenues; and be it further

Resolved, That the 80th General Convention urges all dioceses of the Church to adopt a uniform paid family leave policy (hereinafter, “UPFLP”) at the minimum acceptable level of coverage which should be provided to all employees, and that to the extent that there is a church or other affiliated organization that offers a more comprehensive policy, the policy outlined in this resolution is to be considered the minimum acceptable offering; and be it further

Resolved, That the UPFLP will be modeled along the following parameters:

- a. The Church plan design for the UPFLP will be set up to offer the options of bronze, silver or platinum plans;
- b. The UPFLP will, in its final version, provide a thorough cost analysis, and it is anticipated that the services of an outside consultant will be needed to analyze relevant demographic data in order to provide accurate cost estimates, and further, it is understood that it is currently not possible to share the cost of the UPFLP nationally through an insurance-type program, and therefore, each diocese will need to have the discretion to determine how the cost of the UPFLP will be shared among the churches in that diocese;
- c. The UPFLP will also, in its final version, provide a thorough outline of plan administration considerations in order to assist with developing and maintaining a policy, training supervisors, educating employees, and record keeping;
- d. The UPFLP will in all instances provide for parity of clergy and lay employees;
- e. The UPFLP will in all instances provide for both paid parental/bonding leave, as well as paid caregiver leave; however, levels of plans may vary in terms of which family members will be covered by said caregiver leave;
- f. In all instances, the UPFLP will provide for job protection for any employee on leave;
- g. The UPFLP will provide for a duration of leave of between 6 and 16 weeks;
- h. The UPFLP will offer options to cover between 70% and 100% of covered weekly earnings;
- i. The UPFLP will also provide specific guidance for a variety of specific factors such as how coverage will apply to two parents working for the same employer, definition of covered weekly earnings, qualified reasons to take leave, required documentation to request leave, and coordination with applicable state and federal laws.

Resolved, That the General Convention affirms the teaching that the birth or adoption of a child is a cause of celebration for parents, family and the entire community and that an entire community has responsibility for supporting a family in raising a child; and that family members often need to care for one another in sickness, and that this care and ministry serves to give confidence of your loving care; and that individuals suffering from illness may not be able to work for a period of time; and be it further

Resolved, That the General Convention recognizes that the federal government has a role in ensuring those who are sick are cared for, and that all have sufficient healthcare, enough to eat, adequate housing, and that illness does not economically devastate families. Therefore we call on the federal government to institute a funding mechanism for citizens to take paid family leave in order to care for a newborn child, a foster or adopted child, or immediate family members who require care during illness, as well as providing paid sick leave to the fullest extent possible; and be it further

Resolved, That the General Convention calls on the Office of Government Relations to advocate to the Congress for the establishment of a paid family leave program, in particular for workers who do not have access to paid leave from their employers.

Budget

\$22,000 was paid to American Benefits Consulting to develop three model Paid Family Leave plans.

TASK FORCE TO DEVELOP MODEL SEXUAL HARASSMENT POLICIES & SAFE CHURCH TRAINING

Membership

Ms. Judith Andrews, <i>Chair</i>	Olympia, VIII	2021
The Rt. Rev. Laura Ahrens, <i>Vice-Chair</i>	Connecticut, I	2021
Ms. Kemah Camara	Washington, III	2021
Ms. Cookie Cantwell	East Carolina, IV	2021
Dr. L. Zoe Cole	Colorado, VI	2021
The Rt. Rev. Mark Cowell	Western Kansas, VII	2021
The Rev. Gwen Fry	Arkansas, VII	2021
The Rev. Ivette Linares	Puerto Rico, IX	2021
The Rt. Rev. Kimberly Lucas	Colorado, VI	2021
Ms. Caren Miles	California, VIII	2021
The Rev. Deacon Tim Spannaus	Michigan, V	2021
Mr. Eric Travis	Michigan, V	2021
The Rev. Charlotte Wilson	California, VIII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rev. Julie McCray-Goldsmith, resigned February 2020, replaced with The Rev. Charlotte Wilson.
The Rev. Gwen Fry, resigned December, 2020.

Acknowledgements

The Rev. Shannon Kelly, Director of the Department of Faith Formation, The Episcopal Church
Ms. Kathleen M. Floyd, Senior Vice President: Education and Wellness, Church Pension Group

Mandate

2018-A048 Establish Task Force to Oversee Creation of Training Materials

Resolved, That this 79th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.(o) to create and implement new safe church training materials to be developed during the next triennium to reflect the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults, such committee to be comprised of at least nine (9) and no more than twelve (12) people who reflect the diversity of The Episcopal Church, which should include youth ministers, those working with vulnerable adults, educators for adults, and those experienced in the prevention of sexual abuse; membership should also include at least three (3) persons from the Task Force to Update Sexual Misconduct Policies appointed in 2015; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate their training program with this effort and to appoint a member to serve on the committee; and be it further

Resolved, That such safe church training materials for the prevention of sexual misconduct include written and web-based training materials that include responsive and multilingual online web-based resources, a modern content management system and a curated resource list, such training to provide Universal Training accessible to all congregants and ministry participants that fosters a culture of safety and inclusion for all people and Specialized Training consisting of discrete modules on topics directly related to ministry roles and functions; and be it further

Resolved, That this 79th General Convention assign to the Task Force that will oversee the new safe church training materials the following duties: where and how to host training materials that includes a comprehensive list of resources, develop a plan for continued updating of the training materials and the curating of resources, as well as a plan to oversee this work; and be it further

Resolved, That this 79th General Convention direct the Domestic and Foreign Missionary Society [DFMS] to host on its website the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults for the prevention of sexual misconduct approved in 2017; and be it further

Resolved, That this 79th General Convention of The Episcopal Church commits itself to the financial support of the creation, implementation and maintenance of such safe church training materials to advance clergy wellness and reduce liability.

2018-A109 Create Task Force on Sexual Harassment

Resolved, That the 79th General Convention of the Episcopal Church declares that sexual harassment of adults by clergy, church employees and church members are abuses of trust, a violation of the Baptismal Covenant, contrary to Christian Character, and are therefore wrong; and be it further

Resolved, That the 79th General Convention of the Episcopal Church establish a Task Force on Sexual Harassment to be appointed by the Presiding Bishop and the President of the House of Deputies to prepare a Model Policy for Sexual Harassment of Adults for Dioceses, including parishes, missions, schools, camps, conference centers and other diocesan institutions. It shall be the duty of the Task Force to study, educate, develop curriculum, and propose and promulgate model policy and standards of conduct on different forms of harassment, and to advise the Church as resource persons. The membership of the Task Force is to be representative as to gender, race and ethnic diversity and should include lawyers whose practice covers this area of law or who serve or have served as chancellors for a diocese or church, human resource professionals, educators for adults, and those experienced in the prevention of sexual harassment. Approximately one-third of the members of the Task Force shall be clergy. The Task Force will report to the 80th General Convention and include as part of its report a Model Policy for Sexual Harassment of Adults for Dioceses.

Summary of Work

The work of the Task Force to meet each of its mandates is summarized below. The Task Force broke into two subgroups in order to more effectively accomplish its dual mandates. The whole Task Force met regularly to report on progress and to deliberate and make decisions as a group.

The Process to Create Training Materials

1. Content Analysis

The Training Subgroup identified topics and desired learning outcomes for the training, based on the 2018 Model Policies and Model Anti-Harassment Policy summary document and the Best Practices Guide. Consistent with those documents, the new content eliminates the triggering and blaming aspects of the previous training, focusing on adopting safe practices and building a faithful culture of welcome and clear boundaries.

2. Scope and Sequence

The subgroup organized the topics, subtopics and concepts into courses, based on how topics and concepts related to each other and by the intended audience.

See the Content List below in Appendix A.

3. Vendor identification

During the Chicago meeting, the Task Force screened courses and content from as many potential vendors as could be identified. Additional reviews were conducted in subsequent weeks. The Task Force paid attention to accuracy of content, theological perspectives, instructional design, suitability

for use by TEC, and compatibility with contemporary learning management systems. Several vendors were selected for further review. The list of potential vendors was narrowed to two, both of whom had experience working with TEC and demonstrated capability to produce exceptional courses.

4. RFP

The Task Force issued a Request for Proposals to the two vendors and established a calendar for questions, proposal submission, reviews and presentations of proposals, followed by evaluation and award. The RFP specified course content, delivery and management capabilities, technical requirements and desired schedule. The Task Force invited the vendors to present their proposals to the Task Force May 19 and 20, 2020.

5. Award

The Task Force awarded the project to Praesidium, Inc., which had created the current Safeguarding courses used by TEC. The proposed courses are designed to be all new, not repurposing the current Safeguarding content, and with a changed focus and ethic: the focus of the new courses is honoring our Baptismal Covenant by creating and maintaining a safe environment, without the previous emphasis on avoiding litigation and pro forma compliance. Following the lead of the Model Policies, the new courses are designed to be soundly based in baptismal theology, enabling learners to see and be Christ to all they encounter in their ministries.

6. Development

In the Development phase, major responsibility shifted to Praesidium, as they created training materials for the web and for instructor-led classes. The Training Subgroup reviewed content as development progressed, looking for accuracy, completeness, faithfulness to TEC theology, practice, culture and norms, as well as instructional integrity and suitability for our audiences.

7. Listening Sessions

To assist the Task Force in gaining information and listen to experiences outside of Task Force members, Listening Sessions were developed. The purpose of the Listening Sessions was to ensure that as the Task Force develops the Training Materials, we had the opportunity to hear from the diverse membership of the church regarding topics, training methods, current experiences, and personal stories around each of the Training Areas.

A survey was prepared and sent out to the Church through Episcopal New Service, the General Convention Office and other networks that Task Force members were a part of. The survey asked for demographic information and invited people to indicate which Training Topic they were interested in being a part of for an online Listening Session. Utilizing the data, the Listening Sessions were created to be as diverse as possible. 2 sessions each of the 9 topics were scheduled for November and December. A moderator was hired, and along with Task Force members, listened to over 150 members of TEC. The information and suggestions shared have helped the Task Force to develop the training modules.

8. Content of New Training Materials

A detailed outline of the training materials to be produced by Praesidium with input and participation of the Task Force is listed below in Appendix A.

9. Work remaining for the next triennium

Significant work remains for the 2022-24 Triennium, primarily including translation and cultural adaptation for speakers of Spanish and French. Translation by itself is not adequate, as metaphors, images and guidelines do not work equally well across contexts. Native speakers of Spanish, Creole and French, representing the cultures found in TEC from Province IX to the American Southwest, from Haiti to Europe, are best able to facilitate the adaptation of Safe Church content throughout the Church.

THE PROCESS TO CREATE ANTI-HARASSMENT MATERIALS

The subgroup began its work by broadening the scope of its work to cover harassment generally, because both formal reports and anecdotal evidence demonstrated that the full scope of the problem in the Church was broad, preventing too many members, both lay and ordained, from living fully into our gifts and bearing witness to the Good News. The subgroup also identified initial goals to include seeking out models for its end products. We engaged in close examination of our authorizing resolution; the work of the House of Deputies Special Committee on Sexual Harassment and Exploitation; consultation with the Task Force to Study Sexism in TEC and Develop Anti-Sexism Training; and exploration of possible model documents. We established three guiding principles early on:

1. We were committed to producing resources for the whole Church. The multiple legal and cultural contexts that TEC includes would mean that we could provide only guides and samples, not a universal or binding policy for the whole Church. Each particular TEC context would ultimately need to develop their own culturally appropriate policies based on the principles, practices, and examples we could provide.
2. We wanted to produce two documents: first, a short summary document that could serve as a template for groups to develop an easily distributed, legally binding commitment against harassment; second, a guide to best practices for developing a fuller, more helpful policy for preventing harassment as well as responding well when it occurs. (In the end, we have included the short summary document as an appendix to the larger guide.)
3. There were no other denominational models for the kind of document we hoped to produce. We had to draw on a broader constellation of sources to develop ours: a few helpful policies from individual churches; diocesan policies and guides against bullying; and anti-harassment work in secular contexts (these last ran the gamut from Fortune 500 companies to punk rock and protest movements). We knew from the outset that this would mean whatever we produced this triennium would have to be, in essence, trial use documents that the Church could learn from and adapt as they began to be used.

From October 2019 to October 2020, the committee drafted both the Model Anti-Harassment Policy summary document and the Best Practices Guide and shared them with potential reviewers. We were able to have productive discussions with the rest of the Task Force and a very few chancellors and other outside readers; however, the reality of an entire society living through a pandemic together meant that it was extraordinarily difficult to schedule these meetings efficiently, and in the end, we were not able to workshop the documents as broadly as we had initially hoped and planned. In November 2020, we contracted with Jessica Davis Church Consulting for additional sensitivity editing, and updated the Best Practices Guide accordingly before submitting it in December.

1. Content of the Best Practices Guide

The Best Practices Guide is designed to help Episcopal churches, communities, or other organizations prevent, recognize, and respond to harassment in their midst. The Task Force sought to offer a resource that would serve Episcopal leaders, lay and ordained, in an understandable and easily contextualized way. It is grounded in scripture, theology, and our Baptismal Covenant and Christian identity. Recognizing that humans were meant for life-giving relationships and connection with God, each other, and creation, the document begins with a theological statement and a spiritual call to action.

In creating this Guide, the Diocese of Newark's Dignity At Work Task Force's report to their 141st Convention, "Fostering Respect in Church Settings: Collaborating to Reduce Bullying within our Church Community" (January, 2015) served as a particularly helpful resource.

The segments of the Best Practices Guide include:

- Introduction
- Spiritual Call to Action
- The Legal and Ecclesiastical Position
- How Can Congregations, Dioceses, and other Church Organizations Help to Prevent and Respond to Harassment?
- Appendix A: Examples of relevant behavior, possible remedies, and potential consequences
- Appendix B: Sample resources for persons directly involved
- Appendix C: Model Anti-Harassment Policy

The Model Policy provides a broad overview of the conduct that can be understood as harassing as well as a definition of sexual harassment. It encourages all Episcopal Church leaders, lay and ordained, to respond to harassment whenever they witness it, recognizing leaders' particular responsibility for ensuring a harassment-free environment and prompt responses to hurtful behavior.

The Model Anti-Harassment Policy is a short document that can be easily posted and distributed. It is not intended to serve as the sole statement on harassment for any Episcopal organization. Instead, it

is provided as a starting point from which to craft a robust, context-specific policy with detailed information on how to prevent, report, and respond to harassment in the community.

A copy of the Best Practices Guide, including its appendices is attached to this document below as Appendix B.

2. Vision and Design of the Best Practices Guide and Model Anti-Harassment Policy

The Model Anti-Harassment Policy summary guide and Best Practices Guide reflect the understanding that harassment in a variety of forms permeates the Church. Harassment is perpetrated in many forms and settings; harassers include both clergy and lay people, and the harassed are also both clergy and laity. In some cases, senior clergy harass clergy with less status and/or who represent minority identities. In other cases, the harassers are laity and the victims are clergy (again, often clergy who represent minority identities. And although Title IV presumably addresses incidents of clergy harassment of laity, in too many cases, the form of harassment does not rise to the level recognized by even the informal structures of Title IV. The Model Anti-Harassment Policy summary guide and Best Practices Guide also recognizes that one comprehensive document to cover every context in The Episcopal Church is impossible, and so the Model is to have every institution in TEC follow the Best Practices Guide guidelines to develop their own policies and to keep within the parameters outlined in the Best Practices Guide and to use the Anti-Harassment Policy summary guide as the starting point.

The Task Force envisions these documents to be disseminated to the entire church and available online. The Task Force also envisions that every Congregation, Diocese, and other Church Organizations in The Episcopal Church create and adopt their own Anti-Harassment Policy from the guidance of these two documents by the end of the next triennium.

3. Work for Next Triennium

Preliminary Anti-Harassment training materials are already being created by Praesidium as part of the Safe Church training in a module described in Appendix A. However, the nature of the problem and the variety of contexts in which The Episcopal Church engages in ministry (including different legal as well as cultural contexts and the many forms that harassment can take) means that the work cannot be completed in a single triennium. The work must continue, ideally with a combination of continuing task force and new task force members (representing additional diversity within the Church). This continuing body will need to evaluate these preliminary training materials to determine what is still missing, what needs to be refined, and to continue the development of training curricula throughout the church. The continuing work will include costs for both language translation and adapting the core curriculum for different ministry and cultural settings. “Train the Trainer” materials will also need regular updating to support implementation of the Model Policy and Best Practices Guide.

In order to facilitate the on-going development and training necessary to address the breadth of the problem and the institutional resistance to acknowledging or addressing the problems, the Model

Policy and Best Practices Guide will need to be publicized, while use and local adaptation must be encouraged at all levels of diocesan and institutional hierarchies.

A website has already been created for the revised and updated Safe Church policies and training. Because of the overlap of the subject matter and the fact that the of Resolution 2018-A109 and Resolution 2018-A049 were combined in a single task force, it makes sense that this skeleton website also be used to host the Anti-Harassment Model Policy and Best Practices Guide and related resources as they are created and curated. Like the Safe Church resources, the Anti-harassment resources will also need to be updated. The continuing body should also be equipped to take on that work.

Proposed resolutions

A064 Promote the Adoption and Use of Revised Praesidium Safe Church Training

Resolved, the House of ____ concurring, That the 80th General Convention direct the Office of Communications and the Office of Formation of the Episcopal Church, working in collaboration with FORMA and the Church Pension Group, to use the communication and marketing facilities of The Episcopal Church to promote the adoption and use of the revised Praesidium Safe Church training throughout the Church; that such promotion, marketing and communication vehicles should update all existing references to Safe Church training and reinforce the importance of creating a welcoming, safe environment for all of the people of God participating in Church sponsored or affiliated ministries, programs, congregations and other activities; and be it further

Resolved, That \$15,000 be budgeted for the implementation of this resolution.

EXPLANATION

In 2003, General Convention directed each diocese to develop and adopt policies for the protection of children and youth. In 2015, General Convention directed that these policies be updated, and in 2018, General Convention directed that training for the protection of youth, young adults, and vulnerable adults be updated. Despite Church's commitment to the safety of all, especially children, not all dioceses have consistently implemented their own policies or those updated policies. In order to assure that this commitment is fully implemented, especially as training is being updated to reflect the update of the policies in 2017, the Church must commit resources actually capable of doing so. While the Office of Communication is well-suited to the task of promotion and marketing, the subject matter of the policies requires that the Office of Formation also be involved and authorized to work in conjunction with FORMA and the Church Pension Group, which also has a vested interest in assuring that relevant parish and diocesan leaders throughout the church have demonstrated their

practical commitment to the protection of children, youth, young adults, and vulnerable adults, by completing and updating training in this matter, especially the updated and revised training.

A065 Translation and adaption of Safe Church training for speakers of Spanish, Creole and French

Resolved, the House of ____ concurring, That the 80th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.0 to create and implement Spanish, Creole and French language Safe Church training materials to be developed during the next triennium to reflect the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults, such committee to be comprised of twelve (12 people who reflect the diversity of The Episcopal Church, which should include youth ministers, those working with vulnerable adults, educators for adults, at least eight (8 native speakers of Creole, French and Spanish from several regions and those experienced in the prevention of sexual abuse; membership should also include at least three (3 persons from the Task Force to Develop Model Sexual Harassment Policies & Safe Church Training appointed in 2018; and be it further

Resolved, that such new training materials be based on the Safe Church training developed in the 2018-2020 triennium by Praesidium, Inc., and that the new multi-lingual training be adapted to the variety of cultures in The Episcopal Church, in use of language, images, metaphors, examples, and the like; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate their training program with this effort and to appoint a member to serve on the task force; and be it further

Resolved, That the 80th General Convention of The Episcopal Church commits itself to the financial support of the creation, implementation and maintenance of such safe church training materials to advance clergy wellness and reduce liability; and be it further

Resolved, That \$300,000 be budgeted for the creation of the French, Creole and Spanish Safe Church training materials described in this resolution and \$50,000 for the work of the Task Force.

EXPLANATION

In 2018, General Convention directed development of training to implement the approved 2017 Model Policies for the Protection of Children and Youth and the approved 2017 Model Policies for the Protection of Vulnerable Adults. This training will have been developed in English by June, 2021. To make the training available across the church, it needs to be translated to the official languages of the Church. Literal translation is not the goal: The training must reflect the variety of cultures and traditions found in the Church, so that it can have the effect of changing behaviors and attitudes wherever the people of God interact.

The provided budget allows a translation process modeled on that of the Book of Common Prayer, with a single translator for each language, providing a unity of voice throughout the training, to be supported by consultants representing different regions. The consultants have the responsibility of assuring that the language and content are received and understood in their contexts. The budget also provides for implementing the three languages into the online and instructor-led learning materials.

The resolution further requests the continued support and maintenance of the translated versions of the training by Church Pension Group, consistent with the support of the prior versions of the training.

Ao66 Establish Interim Body to Oversee the Continuing Development of Anti-Harassment Best Practices, Model Policy Examples and Varied Training Materials

Resolved, the House of ___ concurring, That the 80th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.0 to oversee the continuing development and implementation of anti-harassment best practices, model policy examples, and varied training materials. The Task Force shall be comprised of at least nine (9) people who reflect the diversity of The Episcopal Church, to the degree possible, while also including those experienced in adult education, the prevention of sexual abuse, the prevention of employment discrimination, Human Resources, working with Title IV (including chancellors and Intake Officers), and working with survivors of abuse (including Victim Advocates); membership should also include at least three (3) persons from the Task Force to Develop Model Sexual Harassment Policies and Safe Church Training appointed in 2018; and be it further

Resolved, That the Task Force shall seek and consider feedback from local use and adaptation of the original model policy, from as diverse a group of communities within the Church as possible. The goal of the Task Force shall be to refine the Best Practices Guide, to gather samples of policies and practices in actual use across the Church, and to develop additional model policies for use in the broadest spectrum of church locations and extra-parochial communities; and be it further

Resolved, That the Church Pension Group be asked to collaborate with this effort and to appoint a member to serve on the Task Force; and be it further

Resolved, That the 80th General Convention of commit itself to the financial support of the continuing development of these materials, and training, as an element of its efforts to advance clergy wellness and reduce liability, as well as to the ability of all members of the Church to live into the Baptismal Covenant, seeking and serving Christ in all persons; and be it further

Resolved, That \$75,000 be budgeted for the work of the Task Force over the next triennium.

EXPLANATION

While strong policies and training programs are essential components of this work, the various circumstances in which the church does its work, including geographic, legal, cultural, and ministry differences, mean that no single policy or even set of policies can meaningfully identify or address all harassment situations. The establishment of a continuing working group of members with related experience and expertise is essential to the capacity to engage the next step of the work that is required to fulfill the goals of Resolution 2018-A109 and effect long term improvements in the Church's witness to the image of God in each member and all with whom the church engages.

A067 Authorize and Support Interim Use and Local Adaptation of Model Anti-Harassment Policy in Light of Best Practices Guide

Resolved, the House of ____ concurring, That the 80th General Convention direct the Executive Council to provide for the support and encouragement of the interim use and adaptation of the Model Policy to Prevent Harassment by dioceses, congregations, and affiliated institutions; and be it further

Resolved, That the Best Practices Guide and Model Policy be hosted on the Domestic and Foreign Missionary Society [DFMS] Safe Church website. The website shall be adapted and monitored so that it becomes a site for on-going creation and curation of feedback from experimental use and local adaptation of the Best Practices Guide and Model Policy throughout TEC during the next triennium; and be it further

Resolved, That dioceses, congregations, and affiliated institutions report their feedback and recommendations for further development on the basis of their practice to the DFMS hosted Safe Church website.

EXPLANATION

The Best Practices Guide and Model Policy need to be easily accessible to all members and institutions of The Episcopal Church. The DFMS Safe Church website already provides access to the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults and is therefore the ideal location for the Anti-Harassment Best Practices Guide and Model Policy documents. Because the needs and the practices of the Church are so diverse with respect to definitions of harassment, and its reduction and elimination, the continuing collection of data and stories is vital to the development of standardized, yet helpfully varied, training. Because the Task Force proposed to be created by Resolution A066 will also need such information to continue its work, they must also be able to solicit and collect feedback from dioceses, congregations and members of the Church that are following the best practices in their use and adaptation of the Model Policy.

Ao68 Amend Canon 1.17 – Safe Church Training

Resolved, the House of ____ concurring, That Canon 1.17 be amended by adding a new Sec. 9:

Sec. 9. All members of this Church shall take and complete the course of Safe Church Training provided by the Church and the Church Pension Group so that all members can participate fully in creating and maintaining safe environments for all people throughout the Church.

EXPLANATION

The General Convention has been working to address issues of sexual abuse and exploitation within the Church since at least 1985 and has committed itself on multiple occasions to being and becoming a place where children, youth and adults are safe, especially from abuse, neglect and exploitation. This was the primary driver for and the purpose of Safe Church training. However, actual implementation and tracking of training and compliance with the requirements remains inconsistent across the Church. Thus, the time has come to put teeth into the Church's commitment through a canonical provision.

Existing General Convention resolutions do not require all members of the Church to complete the training, although all are strongly encouraged to do so. Continuing evidence demonstrates that the perpetrators of harassment and other forms of misconduct that compromise the Church's ability to witness to the dignity of all humans include lay leaders and other lay members of the church and its affiliates. Best practices research from the secular world confirm that the Bystander Intervention approach of training is most successful in actually reducing incidents of abuse and misconduct. Therefore, it is appropriate that all members of the Church, as defined by the canons, and not just active ministry leaders, be required to complete the training. Although the current training requires adaptation for members under the age of 21, the revised training specifically addresses the needs of the Church's younger members.

Although Resolution 2018-A051 directs that a safe church audit be included in the Diocesan Parochial Report, the report disseminated for reporting in January 2021 did not include this provision. Therefore, a canonical provision is necessary to assure that the whole church is committed to the process to live into the vision of the Church as a place where children, youth, and adults are safe, especially from abuse, neglect, and exploitation.

Ao69 Create DFMS Staff Position to Manage Safe Church Website and Respond to Inquiries

Resolved, the House of ____ concurring, That the 80th General Convention direct the Executive Council to create and fill a staff position, to serve as a point of contact for dioceses and individuals to obtain information about complying with the Model Policies for the Protection of Children, Youth, and Vulnerable Adults and the requirement to complete the updated Praesidium Safe

Church Training managed by the Church Pension Group; and reinforce the importance of creating a welcoming, safe environment for all of the people of God participating in The Episcopal Church sponsored or affiliated ministries, congregations, programs and other activities. This staff person shall report directly to the Canon to the Presiding Bishop for Ministry within The Episcopal Church; and be it further

Resolved, That the Church Pension Group be asked to collaborate and coordinate with this staff person and designate a member to liaise with the staff person, to assure that all necessary information is provided to those who contact the DFMS office with questions and concerns, subject to any applicable confidentiality and/or privacy restrictions, and in the collection and dissemination of information regarding the use and adaptation of diocesan and ministry-specific policies, as well as of use and adaptation of anti-harassment policies based on the Best Practices Guide; and be it further

Resolved, That \$105,000, to include salary and benefits, be budgeted to fund this vital position.

EXPLANATION

The establishment of the Safe Church website provides a point of contact for the gathering and dissemination of information and in that sense can serve the Church well in its efforts to redress the comprehensive and long-standing problems of harassment, sexual abuse and exploitation. However, it is only the beginning of an on-going systemic response. The various listening sessions conducted by the Task Force to Develop Model Sexual Harassment Policies and Safe Church Training have confirmed that despite the long history of work in various dioceses and at various levels of the Church, the inconsistent implementation of training and response to allegations of misconduct by both clergy and laity in the Church leave many wondering where to turn and how to pursue redress for problems, especially, but not exclusively, when laity are the perpetrators of harm. A contact person is needed to help members of the Church, including lay and ordained leaders, identify resources to assist them in responding to complaints and creating cultures in which all members and participants feel safe and welcome.

Supplemental Materials

Table of contents:

1. [Appendix A-Titles and Description of the Nine Modules for Safe Church Training](#)
2. [Appendix B-Best Practices Guide](#)

Appendix A: Titles and Description of the Nine Modules for Safe Church Training

Introduction and Theological Background

- Reasons for the training
- Theological and ethical foundations
- Definitions
- Support video from the Presiding Bishop
- Different groups will get different training, depending on roles and responsibilities
- Content warning: uncomfortable topics; take care of yourself
- Prayer

Inclusion

- All people are beloved children of God
- We work to foster Beloved Communities where all people may experience dignity and abundant life
- Requirement of a commitment to form loving, liberating and life-giving relationships with each other
- How to recognize and respond to discriminatory language/behavior

Healthy Boundaries

- Physical and emotional boundaries
- Power imbalance
- Benefits of healthy boundaries
- Maintaining your own healthy boundaries
- Supporting others' boundaries
- Social media boundaries
- How to recognize and respond when you see unhealthy boundaries
- Adult specific
- Children & youth specific, including self-advocacy, and ways that young adults can speak up

Power Imbalances

- Definitions: age, size, physical, position, orders, race, class, gender, power of the group
- Recognizing - can't eliminate, only recognize them
- Power isn't bad; it's how it's used; abuse of power is the issue
- Healthy relationships
- Hierarchy
- Response to unhealthy expressions of power
- Dual relationships

Pastoral Relationships

- Definition
- Clarity of training & role (stay in your lane)
- Boundaries/restrictions on pastoral relationships and on both sides
- Dual relationships: friend vs friendly,
- Space (windows, doors, one-to-one Zoom, social media)
- Difference between pastoral relationship & counseling

Abuse & Neglect

- Adults - definitions
- Children and youth - definitions
- Identification/recognition
- What do you do if you see it or hear about it
- Reporting: Church and government requirements
- Who and how to report to
- Locate and use resources

Bullying

- Adults
- Children & youth
- Identification/recognition
- Locate and use resources
- When, who and how to report to
- Pastoral care for victims and bullies

Anti-Harassment

- Statement (reiteration*) of Healthy Relationship
- Define harassment, including sexual harassment & legal definition
- Overview of prevention methods, using several broadly representative examples
- How to handle complaints
- Maintaining healthy parish environment
- *building on/referencing work on boundaries, power differentials, and healthy relationships elsewhere in modules.

Organizational Rules and Specific Ministry Policies

- Model policies: Children and Youth, Vulnerable Adults
- Diocesan content
- Best practices
- Screening, Monitoring & Supervision standards

Train the Trainer

- Facilitation of online and face-to-face instruction
- Use of Safe Church courses and modules, including the Learning Management System

Appendix B: Best Practices Guide

Introduction

We are putting no obstacle in anyone's way, so that no fault may be found with our ministry, but as servants of God we have commended ourselves in every way.

2 Corinthians 6:3-4

We all are called for service to witness in God's name.

Our ministries are different, our purpose is the same:
to touch the lives of others by God's surprising grace,
so people of all nations may feel God's warm embrace.

"We all are one in mission", Wonder, Love, and Praise 779

From the beginning, human beings were meant for connection and relationship. "It's not good that the human is alone," God said, and made a helper and partner.⁽¹⁾ As members of one body in Christ, as people called to minister in God's name, we seek to nurture interpersonal relationships that are healthy and life-giving for all. We hope and perhaps even expect that the Church should be a place where we can trust one another and where God's warm embrace feels comfortably close at hand.

Yet too often, the Church has fallen far short of that goal. The ways in which the Church has fallen short were detailed by the House of Deputies Special Committee on Harassment and Exploitation in 2018. They confirmed that many of the Church's members, lay and ordained, experience various forms of harassment that interfere with their ability to live fully into their vocations or roles and to participate in the life and work of the Church.⁽²⁾ When any member harasses another, they abuse the trust of the whole Body, violate the baptismal covenant, and act contrary to Christian character. Harassment (whether by lay or ordained members of the Body) must be taken seriously by the whole Church, because when any member harms another, the whole Body is harmed.

Harassment is unwelcome conduct toward an individual on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, marital status, or any legally protected status, any time the conduct creates an intimidating, hostile, or offensive environment. Examples of harassment that may violate this policy include, but are not limited to ⁽³⁾

- Oral, written, or electronic communications that contain slurs, negative stereotyping, offensive jokes, insults, or threats. This includes comments or jokes that are dismissive of human dignity or targeted at individuals or groups based on attributes listed above.
- Nonverbal conduct, such as leering and giving inappropriate gifts.
- Physical conduct, such as assault or unwanted touching.
- Visual images, such as derogatory or offensive pictures, cartoons, drawings or gestures. Such prohibited images include those in hard copy or electronic form.

- Expressed or implied demands for favors in exchange for some benefit (e.g., a promotion, a leadership role) or to avoid some detriment (e.g., termination, removed financial support for a pet project)

Taking harassment seriously includes taking seriously the differences of power resulting from distinctions in order and role, as well as power differentials that also exist outside the Church.⁽⁴⁾ It includes doing all we can to prevent harassment from happening as well as providing structures for responding appropriately to stop harassment; for redressing harm caused by harassment to the harassed, the harasser, and the community; and for exploring how and when reconciliation may be possible. Such responses will and should vary depending on the circumstances.

This document is for you if you have ever witnessed or experienced harassment in the Church and wondered how you can help prevent it from happening to someone else. This document is for you if you have been accused of harassment in the past and wondered how you can avoid similar situations in the future. This document is for you if you work in shared spaces with representatives or ministries of the Episcopal Church and want to build a culture of mutual respect.

But this document is especially for you if you are a lay or ordained leader of any sort in any Episcopal church, community, or other context. When we accept leadership roles, we accept heightened responsibility for helping to set expectations in our context, as well as for noticing and redirecting harassing behavior in others. Leaders also bear a particular responsibility for understanding how their own behavior may land (including the reality that their behavior may land differently simply because they are a leader).

This document is designed to assist you in preventing and responding to harassment in your context. It serves as a statement and a guide for the Episcopal Church, to help ensure that the behavior of church members (individually and corporately) witnesses to the transforming power of God's love. It offers a set of best practices for developing consistent methods of preventing, identifying, and compassionately responding to the harassment we know is taking place in the Church. The practices outlined here are designed to govern all members of the Church, lay and ordained; employees of churches, broader Church or church-related entities such as camp & conference centers, schools, etc.; volunteers; service providers; and any others acting on church/institutional property or participating in church-sponsored events.

This document starts from the perspective of protecting those most vulnerable, because by doing so, we increase the safety of and support for all persons. Anyone may be harassed, and anyone may harass another person; however, women; trans, nonbinary and gender nonconforming persons; children; the elderly; those who are Black, Indigenous and/or people of color; and persons with disabilities are often at greater risk of harassment, including sexual harassment and assault.

In most cases, these practices and the model policy they guide focus on forms of harassment other than physical or sexual abuse and/or assault, although some cases of harassment may ultimately escalate to become such cases. While there may be a variety of responses to harassment which appropriately redress harm and maintain community bonds, there is never any excuse for, nor should there be toleration for, abuse or assault.⁽⁵⁾

As a Church body, we have learned through hard experience that ignoring harassment within the body of Christ will not make it go away - it simply reduces the Church's capacity to witness to God's transforming love. Policies and practices are not a magic wand; they cannot substitute for an authentic culture of mutual care for one another, nor for the caring responses needed when harassment occurs. However, their implementation often helps communities to become and remain more spiritually healthy and to reduce the occurrence of harassment.

Spiritual Call to Action

Then God said, "Let us make humankind in our image, according to our likeness...." So God created humankind in his image, in the image of God he created them.
Genesis 1:26a, 27a

Every person is made in the image of God. This reality undergirds everything we do as the people of God, especially when it comes to how we treat one another. All our words and actions - as individuals, as communities, and as a whole Church - must therefore be informed by this truth. We seek always to honor the divine image in one another and in ourselves through our words and actions. When we fail to do so, we hurt one another and we obscure God's image in ourselves.

When Jesus highlighted the commandments to love God with all we are and have and to love our neighbors as ourselves,⁽⁶⁾ he reinforced for us that link. We cannot honor God and hurt our sibling;⁽⁷⁾ we cannot harm our sibling and hope to escape unscathed ourselves.⁽⁸⁾

When we are received into the household of God through baptism, these bonds are sealed in a new way. We promise to respect the dignity of every human being, to seek and serve Christ in each other, and to strive for justice and peace among all people.⁽⁹⁾ These promises do not leave room for us to harass or intimidate or retaliate against one another, nor do they permit us to stand by silently when others do these things. All of us, lay and ordained, are equally bound by these promises. All forms of harassment, aggressive pressure or intimidation, persecution, force, coercion, and molestation are violations of our baptismal vows.

At the same time, our understanding of God's command to love one another is formed by the people around us. In particular, our race, ethnicity, and culture affect what we perceive to be harassment in ways we may not always be aware of. A firm tone of voice may be considered appropriate and respectful in one cultural context yet feel aggressive to someone from another context. Avoiding eye contact may be experienced as respectful by one person or a sign of mistrust by another. It is crucial that our conversations about how to respect the dignity of each person include voices from a range of cultural perspectives as we set the tone for what we consider "appropriate" in our settings. We must take into account the full range of power differences in a situation and prioritize safety first and comfort second as we seek to live out our love and respect for one another.

The image of God within each of us and the promises we make to God and one another in baptism call us to be better. When we become aware of situations that obscure God's image in ourselves, in members of our communities, and in those we serve, we are compelled to act on that awareness.

The Legal and Ecclesiastical Position

Almighty God, whose loving hand has given us all that we possess: Grant us grace that we may honor you with our substance, and, remembering the account which we must one day give, may be faithful stewards of your bounty, through Jesus Christ our Lord. Amen.

For the Right Use of God's Gifts, Book of Common Prayer, p. 827

Although no comprehensive policy yet exists outlining general expectations for how all church members and others in church settings treat each other, several existing church policies do address various types of improper conduct in our Episcopal communities.

Such policies include but are not limited to:

- Title III on Ministry and especially Canon III.1 on Lay Ministry.
- Title IV on Ecclesiastical Discipline for ordained ministers.
- Model Policies for the Protection of Children, Youth and Vulnerable Adults.
- Anti-Racism Training.
- Canons prohibiting discrimination against members and employees of the church as well as in the discernment process for ordination on the basis of race, color, ethnic origin, national origin, marital or family status (including pregnancy or child care plans), sex, sexual orientation, gender identity and expression, disabilities or age.
- Charter for the Safety of People within the Churches of the Anglican Communion.

These may have implications for a faithful response to harassment (sexual and otherwise).

Harassment may be understood as a form of discrimination, and thus definitions of harassment are often part of laws against discrimination. Secular laws against discrimination vary by region and country, and, in the United States, by state. Because TEC exists throughout the United States and in 16 other countries in several very different regions of the world, no single definition of harassment is likely to be helpful in ensuring that all people are treated with dignity and respect in all parts of the church. Still, some of the characteristics of harassment deemed illegal in different parts of the world may include:

- Certain forms of unequal treatment or bullying.
- Verbal, physical, or sexual conduct, when unwelcome.
- Unwelcome behavior motivated by a person's actual or perceived sex, sexual orientation, gender identity/expression, race/ethnicity, age, ability, or physical appearance or background.
- Behavior that creates/has the purpose of creating hostility, intimidation, humiliation or offense.
- Making a person's employment or role within the organization conditional on their acceptance of certain unwelcome conduct.

Although all Christians have made a commitment to love our neighbors as ourselves, only clergy are currently subject to discipline under the canons for violations of these promises. Although some parish bylaws and diocesan canons provide for the removal of lay leaders (especially wardens and vestry members) from ministry leadership positions, no churchwide policies provide for discipline when a lay

person harasses another person (lay or ordained). Parishes, dioceses, and other church organizations that have relevant policies can use these as guides as they adapt the sample policies and best practices to the particular contexts of their communities.

In some cases, actions by individuals in the Church may give rise to secular lawsuits. It may also be necessary for the Church to involve the police or other secular legal authorities and support the prosecution of, or other legal action against, the harasser. In these and all harassment situations, the church has a responsibility to provide for the entire community's sense of safety as they consider the harasser's participation in the life of the church. When police or other secular authorities become involved, this is likely to increase the trauma some members of the community experience. Such involvement may also lead to a harasser escalating the unwanted behavior. Care should therefore be taken to engage law enforcement officers only when necessary, when doing so is required by law, and with the goal of preventing and/or ending harm. Questions about whether or how to involve secular legal authorities should never turn on considerations of liability alone or minimization or denial of problems. It is vital for institutional leaders to take all allegations of harassment seriously so that prompt and supportive action can be taken for the well-being of all in the community.

How Can Congregations, Dioceses, and other Church Organizations Help to Prevent and Respond to Harassment?

You... were called to be free. But do not use your freedom to indulge the flesh; rather, serve one another humbly in love. For the entire law is fulfilled in keeping this one command: "Love your neighbor as yourself."

Galatians 5:13-14, CEB

The freedom for which Christ has set us free is the freedom to love actively: to grow in community with God and with one another in order that the whole body of Christ might flourish. But as the apostle Paul taught, often we do not do the good we want to do; instead, we do the very thing we mean to avoid. When that happens, our communities - whether congregations, dioceses, schools, or other groups - can help us reorient ourselves toward that love which respects the dignity of every person, so that we can choose the good next time.

Even before your group has established a formal policy for preventing and responding to harassment, you can begin to set standards about how you intend to treat each other, whether in physical space or digital space. These standards should be modeled by ordained and lay staff and leadership. Consider especially the following norms:

Make seeking consent a part of everything you do. It might feel odd at first to ask, "May I sit here?" "Can I give you a high five or a hug?" or "Would you like help carrying that?" and to hear "No thank you" as easily as "Yes, please". But the more we make it a habit in all our interactions, from greeting a small child to comforting the bereaved, the less we will have to work to remember it in situations that might otherwise feel sexualized, and the more we will honor God's image in one another and in ourselves.

If a person says, "This is upsetting to me," practice taking that seriously, no matter how innocently the

original comment or action was meant. (Keep in mind that the most important priority is everyone's safety and basic human dignity - not protection from uncomfortable truths. Sometimes we feel upset because we have been wronged, and sometimes we feel upset because someone has asked us to acknowledge that we have done wrong. Taking the moment seriously means taking the context seriously as well.) When we make it a habit to stop, listen, and adjust our behavior even in the little hurts, it's easier to avoid hurting each other in bigger ways. It also makes us more likely to respond well when we do hurt each other in bigger ways.

Practice letting go of opinions about other people's bodies. When we learn not to worry about how other people dress their bodies, how big or small those bodies are, how people manage what their bodies can or cannot do, etc., we don't have to worry about whether our comments about their bodies will be received the way we meant them.

Consider your group's culture of ritual touch in addition to everyday touch. For instance, how do/could/will moments such as the passing of the peace truly honor the dignity of and divine image in each person, as they were created to do?

Focus on building Christian relationships of mutual accountability grounded in God's call and love. Commit to telling the truth about yourselves and others and be honest about harm done by and to you. Practice receiving others' apologies with compassion rather than shaming them or minimizing the impact. Teach and model confession, lament, intercessory prayer, and making amends as key ingredients to building accountable Christian communities.

Our good intentions are easier to live out when our communities have agreed on what it looks like to love one another honestly and serve one another humbly. In addition to being intentional with our informal community norms, formal anti-harassment policies help us clarify our vision and standards for our community and give us a path forward when harassment does occur. You will find several examples of anti-harassment policies at www.episcopalchurch.org/safe-church. One or more may provide a useful template for your own group.

Whether you begin from a template or from scratch, don't go it alone. Your policy will better reflect your community and have more authority among your members if the group that creates it includes clergy, staff, and lay members who represent the diversity of your particular community. Recognize as you invite these individuals that members of vulnerable communities must be part of the work if it is to reflect their needs and their past experiences of harassment. Recognize also that many of these individuals are frequently asked to give the Church the benefit of their labor and experience and consider compensating them for this work if you are able to do so. If your local context includes intentional communities and/or community organizing networks, you may find these to be valuable resources as well.

Keep in mind that ordained and lay staff, volunteers, and members may all experience or witness harassment. Anyone may also harass, either intentionally or unintentionally. Therefore, your policy will need to provide all members of the community with options for responding if they do experience or witness harassment, as well as help everyone to understand how behavior may be experienced as

harassing so they can avoid it. The more representative your group is, the more effective your policy will be at accounting for the variety of situations you may encounter.

Here are some other important considerations to take as you create your own anti-harassment policy:

Take a “bystander intervention” approach

As the church, non-profit, and corporate worlds alike have incorporated more policies and trainings to improve workplace safety and inclusion, we have learned a bit about what works and what doesn't. Most of us don't just want the environments around us to be safe for us - we want them to be safe for everyone! Yet we can find ourselves getting resentful when trainings and policies seem to assume we are behaving badly and need to be kept under control.

The most effective way to help transform your culture is to assume that most people in your church, diocese, school, or organization mean well and want to help make a safe environment. Approach your policy writing, follow-up communications, and training from this perspective. Commit to supporting one another in becoming an accountable community where members speak and receive the truth about harm that is done. Teach people how to seek help, how to apologize, and how to make appropriate amends. Teach them what to watch for, how to intervene, and how to support those who have been harassed. The more you treat people like they're on the team, the more likely it is they'll act like they're on the team.

Plan how you will respond when harassment occurs

Your policy should include a plan for ensuring that its goals and promises can be lived out. Identify a process for how to report a violation as well as what steps should be taken once it is reported. Include what interim steps you might take while the report is investigated, in order to ensure a sense of safety for those involved. Commit to seeing your process through and know whose responsibility it is to oversee which steps.

As a Church, we minister in hundreds of different cultural and legal contexts. It would be impossible to craft a detailed, “one-size-fits-all” response to harassment across all these contexts; however, there are a number of things you will need to consider as you plan your local policy:

What is the reality of your context? Are you highly resourced? Is your system based on one person doing everything? Does everyone know each other? How is the reality of your context both a blessing and a drawback? How will that impact what it looks like to follow up and monitor complaints in your community?

In particular, what resources are available in your local community to help you respond to harassment? While the police may be needed for things like filing reports, learn about who else in your community can help instead or as well. Mental and behavioral health professionals, county social service agencies, local transformative justice groups, and community advocacy and support organizations may be able to provide training and consultation.

Most people who experience harassment simply want the behavior to stop. While we want our policies

and their enforcement to be rigorously fair, it's important to take into account the unique details of each situation. Some situations call for disciplinary action beyond a change of behavior; others do not. Remember that our goal is to be both fair and sensitive at the same time, to treat all with dignity and respect and to create a pathway to relationship in community for the one who has done harm, if they are willing to take accountability.

- Provide compassionate care for the person making the complaint of harassment.
- Listen to the complainant's description of what happened and ask what they want done.
- Work for the best solution for the person(s) who have been harmed, prioritizing their self-determination whenever possible.
- Mutually agree on a Pastoral Care Partner for the complainant. This PCP will walk with the complainant through the rest of the process.
- Mutually agree on a Pastoral Care Partner for the accused. This PCP will walk with the accused through the rest of the process.
- Follow the laws and policies of your location.
- Keep the matter as confidential as possible, without diminishing the complainant's agency or ability to appropriately function.
- Make a plan for the safety of the community.
- Deal with the situation in a timely manner, while staying in regular communication with the persons most directly involved.
- Keep the complainant's sense of safety as a primary concern as you explore options for resolution.
- Follow up periodically with the complainant after the initial resolution. Address any retaliation, whether direct (such as removing someone from a committee or job) or indirect (such as being treated coolly by members of the congregation).
- Don't force reconciliation. Keep in mind that interpersonal relationships are messy and there may be many faithful outcomes for any given situation.
- Include a resource page for those who may have experienced harassment as well as one for those who have been accused of harassment. (Samples of such a resource can be found in Appendix B of this document.)
- Identify who should respond to allegations of harassment

Choosing who will respond is a matter that requires particular care and consideration. You will need to identify who can begin in this role immediately, and also whether this person or team will be your best long-term solution. In most cases, the best long-term answer to this question is to form or connect with an ombuds team or office. However, as this is a relatively recent approach to resolving instances of sexual harassment, most congregations, dioceses, and other Episcopal groups and organizations will not immediately have access to this model.

In the meantime, consider who in your sphere might match the following description.

An effective intake person will be:

- Trusted by all constituencies. They must have the trust of the bishop/rector/senior leadership, as well as of those who have the least power and authority in your group (visitors, new members, students, employees, etc.). They must also have the trust of those who will offer counsel to the harassed (staff, teachers, lead volunteers, camp counselors, etc.) so that they will recommend speaking with the intake person.
- A bridge builder. They must work with all sorts of people in all sorts of situations and be able to help people come to common conclusions. They must be able to step outside of their own experience to have empathy with people of various backgrounds and identities.
- A problem solver. They must be a respectful listener so that they can help people find solutions appropriate to the situation instead of merely imposing a one-size-fits-all answer. They must be able to discern when an informal response is enough to stop the behavior, and when a formal process must be engaged. They should have a healthy approach to conflict and not be avoidant or over-fond of it.
- Equipped. They must have sufficient time to dedicate to this work, as well as clear policies and procedures to guide their responses. They and you should be clear about their role: are they to facilitate a consensus, make recommendations, or impose a final and binding obligation? They will likely also need ongoing emotional and spiritual support, especially if and when they have a relationship with any party to the complaint.
- Discreet. They must be able to keep strict confidentiality when required and refrain from public speculation or private gossip when strict confidentiality is not possible.
- Connected but independent. An intake coordinator will not be able to earn full trust if they are so caught up in the church systems that they cannot take the risk of saying something the senior leadership doesn't want to hear. Nor will they be able to work effectively if they are so far outside that they do not understand how church systems operate. Ideally, they would also be conversant with canonical and legal standards as well as counseling practices.

Where might you find such a person? Unless you have the financial and human resources to hire an outside expert (and most of us won't), you'll likely need to find someone who can begin with the appropriate levels of trust and responsible character and learn the specific skills required for this role. In most circumstances, the best answer is to equip a team of at least two people, to maximize the possibility of trust and provide some collegiality and accountability for the intake coordinators themselves. Good candidates for the role might include:

- A lay person with outside training in this work (The fact that lay people do not vow obedience to the institution of the Church can be very helpful here.)
- A lay or clergy person with a previous counseling background
- A well-trusted, retired bishop of another diocese
- Someone on the staff of the parish/diocese/school/organization who is not the rector/bishop/senior leader

- Someone who has been a leader in a neighboring parish/diocese/organization but is outside the direct scope of your church or organization
- Someone without a formal role in your church or organization who has a high level of trust from all parties.

Finally, keep in mind that very few people trust any institution, including the Church, to respond well when harassment occurs. Your intake coordinator(s) will begin with a trust deficit to overcome. You can set the stage for easier trust building by gathering a small group of people who represent different stakeholders in your church or organization, and discerning together whom to appoint to this position, rather than having the rector/bishop/senior leader appoint them independently.

Communicate with the whole Body

Once you have identified what behaviors you expect from one another and how you will respond when people behave otherwise, it's time to share the plan with the whole community. Make your policy widely available, including on your website and in hard copy. Create a short summary version of your policy that can be posted in plain view and/or handed out regularly. (A model policy of this sort can be found in Appendix B of this document.)

Discuss it as a community. Make these expectations as much a part of your community's care for each other as washing your hands. Have regular conversations with your ordained and lay staff and leadership about how your goals are being lived out and how your community can keep building on these goals.

Train leaders

While keeping people safe from harassment is the work of the whole community, your leaders bear particular responsibility for helping model this well and offering constructive correction where needed. Train your leaders regularly on what you expect from them and make confession, seeking forgiveness, and making amends a regular part of your life together.⁽¹⁰⁾

Appendix A: Examples of harassing behavior, possible remedies, and potential consequences

Examples of harassing behavior

This list of behaviors is not exhaustive, but gives a clear indication of the types of actions that constitute harassment:

- consistently attacking someone's professional or personal standing
- attempting to make someone appear incompetent
- deliberate sabotage of a person's work or actions
- public or private displays of offensive material
- use of emails or texts to harass or insult, sent either to the individual or to third parties
- spreading malicious rumors to third parties
- public humiliation by constant innuendo, belittling and 'putting down'
- personal or aggressive insults
- aggressive gestures, verbal threats and intimidation
- unwanted physical contact
- talking/shouting directly into someone's face
- direct physical intimidation, violence or assault
- persistent threats to a person's security

Examples of sexual harassment

The following describes some of the types of acts that may be sexual harassment:

- Touching, pinching, patting, grabbing, poking or brushing against another person's body
- Rape, sexual battery, molestation or attempts to commit these assaults
- Prolonged handshakes or hugs, including ritual greetings such as the passing of the peace
- Requests for sexual favors, including those accompanied by implied or overt threats. Such threats may include job performance evaluations, promotions or pay, access to volunteer roles, or personal safety;
- Subtle or obvious pressure for unwelcome sexual activities
- Unwanted expressions of sexual attraction, especially repeated expressions
- Sexually-oriented gestures, noises, remarks, jokes or comments about a person's sexuality or sexual experience, which create a hostile, uncomfortable environment
- Sexually-oriented displays or publications, such as pictures, posters, calendars, graffiti, objects, promotional material, reading materials, or other materials that are sexually demeaning or pornographic. This includes such displays on church-owned or church-operated computers or cell phones and sharing any such displays while in the church context.

- Overly generous gifts or gifts of a sexual, intimate nature.
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity, and the status of being transgender, such as:
 - Interfering with, destroying or damaging a person's workstation, tools or equipment;
 - Sabotaging an individual's work;
 - Bullying, yelling, slurs;
 - Requesting or demanding intimate information, such as information about someone's genitalia, medical procedures, or sexual activities.

Examples of Remedial Measures for Clergy Who are Aggressors

- Title IV;
- Recommend peer support group;
- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;
- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Requiring restitution and/or restoration of Complainant to prior position.

Examples of Remedial Measures for Lay Staff Aggressor

- Recommend peer support group;
- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;
- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Requiring restitution and/or restoration of Complainant to prior position.
- Termination.

Examples of Remedial Measures for Wardens and Vestry Members who are the Aggressor

- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;

- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Requiring restitution and/or restoration of Complainant to prior position.
- Recommendation for resignation.
- Removal from position

Examples of Remedial Measures for Lay People who are the Aggressor and not office-holders

- Oral or written warning;
- Recommendations of appropriate behavior;
- Corrective instruction or other relevant learning or service experience;
- Recommend behavior assessment or evaluation;
- Behavioral management plan, with benchmarks that are closely monitored;
- Counseling;
- Removal from the Community, short or long term.

Examples of Consequences for Clergy

- Referral of the matter to the Ecclesiastical Disciplinary System (Title IV);
- A letter to the personnel file;
- Legal action;
- A Pastoral Directive that could include requirements for training, counseling, etc.

Examples of Consequences Lay Staff

- Letter of reprimand;
- Probation;
- Salary freeze;
- Temporary removal from duties;
- Legal action;
- Suspension with or without pay; and
- Termination.

Example of Consequences for Wardens or Vestry Members

- Counseling or related services;
- A request for resignation;
- Removal of warden or vestry member, and
- Legal action.

Examples of Consequences for Lay People who aren't office-holders

- Counseling or related services;
- Participation contingent on changed behavior
- Requirement to limit participation
- Removal of participation

Examples of Support for Clergy Subjects of Harassment

- Pastoral Support from an appropriate source
- Development of a recommended protection/ safety plan
- Expectation that the needs and comfort of the target of the harassment take precedence
- Congregational leadership involvement that includes lay and clergy
- Possible changes could include physical environment; work schedules; ministry oversight responsibilities
- Regular check-in
- Open to modification
- Counseling
- Documentation of incident, response, and follow-up
- Furlough or other leave at full pay

Examples of Support for Staff Subjects of Harassment

- Pastoral Support from an appropriate source
- Development of a recommended protection/ safety plan
- Expectation that the needs and comfort of the target of the harassment take precedence
- Congregational leadership involvement that includes lay and clergy
- Possible changes could include physical environment; work schedules; ministry oversight responsibilities
- Regular check-in
- Open to modification
- Counseling
- Documentation of incident, response, and follow-up
- Furlough or other leave at full pay

Examples of Support for Wardens and Vestry persons Subject of Bullying

- Pastoral Support from an appropriate source
- Development of a recommended protection/ safety plan

- Expectation that the needs and comfort of the target of the harassment take precedence
- Congregational leadership involvement that includes lay and clergy
- Possible changes could include physical environment; work schedules; ministry oversight responsibilities
- Regular check-in
- Open to modification
- Counseling
- Documentation of incident, response, and follow-up

Appendix B: Sample resources for persons directly involved

I think I have been the Subject of Harassment. What can I do?

If you think you've been harassed, you might feel afraid that no one will believe you. You might wonder if what you are experiencing is harassment or if you are making too much out of the experience. You might even blame yourself. These are common responses, but you are not to blame for any harassment. You are not responsible for determining whether what you are experiencing is harassment or for addressing it. You deserve to be believed and you do not need to go through this alone. The Church is charged with keeping all members safe from such behavior and has chosen and equipped intake coordinators to receive your report and offer you the support you deserve.

Harassment often starts subtly and becomes more severe over time. Those who harass others are unlikely to stop unless they are confronted. If they are challenged early, though, it is often possible to stop the behavior using informal means. So, if you do not feel physically threatened, make a report to the intake coordinator identified by your organization as soon as you are able.

Your report should include a record of all experiences of harassment. Document as much of the following as possible:

- Date, time, and place of incident
- Nature of incident: with as much detail as possible, tell what happened and its effect on you
- Name/ contact information of witnesses and any additional information they have, including other targets of the harasser
- Any action you, the harasser, or others have taken, including spoken or written conversation(s) about the incident
- Emails, text, voice messages, or any other communications that relate to the incident
- Anything else that helps develop a fuller picture of the situation

If there are gaps in your memory, record as much as you know. This information may be needed as evidence.

Do not meet with or confront the harasser alone.

It is never too late to ask for help. If you have been harassed, you deserve and will receive support.

If you do feel that your physical safety may be in danger, trust your judgment. Your intake coordinator will help you access the services you need to be safe. Besides the police, these might include support resources inside and outside your Episcopal community.

I have been accused of Harassment. What can I do?

As part of the Church's work to keep all members safe from harassment, all such complaints must be followed up and investigated. If you are accused of harassment, you will have a chance to respond to the accusation. However, simply denying there is a problem or insisting that the problem lies with the Complainant will not be a sufficient response. Your church, diocese, or organization has identified and equipped intake coordinators and others who will listen to your experience of the incident(s) and offer you the appropriate support and guidance.

If you have been accused of harassment, do not seek to meet with the complainant alone and do not agree to do so if asked.

Do contact the appropriate intake coordinator as soon as possible. They will meet with you privately to talk through the situation. They will listen to you fully and will take all relevant information into account. They may discuss constructive response options with you.

Sometimes, the problem can be resolved informally through discussion with the intake coordinator. It is possible that you did not realize the impact your behavior or words have had on others, in which case becoming aware of this and acting or speaking differently may redress the problem. In other instances, further work and a more formal process may be needed. You might be offered professional help to recognize, understand, and change your behavior. In some situations, a refusal to accept this help could result in corrective action, loss of ministry leadership or participation, or even legal action taken against you.

If you are a clergy person accused of harassment, a formal complaint might be lodged against you and there may be consideration of whether the matter constitutes misconduct under Title IV of the canons.

Throughout all formal or informal responses to harassment accusations, the primary objective is to identify the underlying issues and fully eliminate the cause(s) of offense in a timely manner and without retribution.

Appendix C: Model Anti-Harassment Policy for posting or distribution

This document provides a model for a short summary policy that can easily be posted in plain view and/or handed out. It should not be used as a substitute for creating a robust policy specific to your context with detailed information on how to prevent and respond to harassment.

Model Anti-Harassment Policy

It is the policy of The Episcopal Church to provide and maintain our environments free from harassment of any kind as part of our Baptismal commitment to respect the dignity of every human being. Additionally, it is important that we fully comply with all applicable laws in creating healthy working environments. Harassment undermines the integrity of our relationships and negatively impacts the morale and productivity of all who participate in the life of The Episcopal Church.

It is prohibited for any employee, supervisor, volunteer, member, visitor, or program participant (whether clergy or lay) to harass another employee, supervisor, volunteer, member, visitor, or program participant (whether clergy or lay) during working or non-working hours, on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, or marital status.

Harassing Conduct

Harassment is unwelcome conduct toward an individual on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, marital status, or any legally protected status, any time the conduct creates an intimidating, hostile, or offensive environment. Examples of harassment that may violate this policy include, but are not limited to: ⁽¹¹⁾

- Oral, written, or electronic communications that contain slurs, negative stereotyping, offensive jokes, insults, or threats. This includes comments or jokes that are dismissive of human dignity or targeted at individuals or groups based on attributes listed above.
- Nonverbal conduct, such as leering and giving inappropriate gifts.
- Physical conduct, such as assault or unwanted touching.
- Visual images, such as derogatory or offensive pictures, cartoons, drawings or gestures. Such prohibited images include those in hard copy or electronic form.
- Expressed or implied demands for favors in exchange for some benefit (e.g., a promotion, a leadership role) or to avoid some detriment (e.g., termination, removed financial support for a pet project)

Sexual harassment

Sexual harassment means unwelcome sexual advances, unwelcome requests for sexual favors, unwelcome physical contact of a sexual nature, or unwelcome verbal or physical conduct of a sexual nature.

Sexual harassment includes conduct directed by a person at another person of the same or another gender. Unwelcome verbal or physical conduct of a sexual nature includes, but is not limited to, the deliberate, repeated making of unsolicited gestures or comments of a sexual nature; the deliberate, repeated display of offensive sexually graphic materials; or deliberate verbal or physical conduct of a sexual nature, whether or not repeated, that is sufficiently severe to interfere substantially within a ministry context and/or an employee's work performance or to create an intimidating, hostile or offensive environment.

Behavior that respects dignity and difference

Our goal is to have an environment where we all treat each other respectfully. Any behavior that does not respect a person's dignity, even if it does not rise to the level of "harassment," interferes with that goal. Episcopal Church leaders at all levels and in all contexts are encouraged, as part of setting and maintaining an appropriate tone, to respond to behavior that falls short of this goal, even where no one has complained or indicated they have been offended.

How to report a violation

Do not assume that your supervisor, clergyperson, or ministry leader is aware of the problem. We need you to bring your complaints and concerns to our attention so that we can help resolve them. When concerns and complaints arise, document them. If you wish to report your concerns, bring them to the designated response person, if your ministry context has one, or else to your immediate supervisor or ministry leader. (If your immediate supervisor or ministry leader is the harasser, you should bring your concerns to their supervisor if they have one, or to another leader in the community.)

Investigation and response

When you report a complaint of harassment or inappropriate behavior, your complaint will be investigated. Where there has been a violation of policy, appropriate action will be taken to resolve problems and avoid future violations. In appropriate cases, disciplinary action (including potential termination of employment or leadership responsibilities) may be taken against those violating the Anti-Harassment Policy. You can expect to be informed periodically about the status of your complaint.

Leadership responsibility

While building a culture of respect and appropriate behavior is work that belongs to the whole community, it is the responsibility of senior lay and clergy leadership to ensure an environment free of harassment and inappropriate behavior and that complaints are handled promptly and effectively. Leadership with personnel responsibilities must: inform their employees, clergy, supervisors, volunteers, and members about this policy (including posting this policy in an easily visible location); specify a

person to hear complaints; promptly investigate allegations of harassment; take appropriate action (including disciplinary action); and take steps to prevent retaliation.

Retaliation is prohibited

This policy strictly prohibits any retaliation against any person who reports a concern about harassment or other inappropriate behavior or participates in an investigation of a violation of this policy. To help avoid retaliation, senior leadership shall make an earnest effort to facilitate repentance and repair within the affected community.

Endnotes

(1) Genesis 1:18, Common English Bible.

(2) Members of the committee gathered data informally from lay and ordained members throughout the Church, including their own experiences of systemic sexism, misogyny, misuse of power, sexual harassment, exploitation, and violence in the Church (and other employment and institutional settings). Although other denominations, including the United Methodist Church, have gathered official data on these issues within their denomination, and these reports informed the special committee's work, TEC has not conducted a formal, denomination-wide study. A report of the special committee's work was not included in the Blue Book for the 79th General Convention but may be found on-line at <https://extranet.generalconvention.org/staff/files/download/22107> . In addition, a summary of the committee's work and resulting resolutions may be found on-line at <https://houseofdeputies.org/2018/10/06/special-committee-on-sexual-harassment-and-exploitation-legislation/>

(3) A more detailed list of example behaviors is included in Appendix A.

(4) These may include but are not limited to: ability, gender, race, wealth and status, relative size, familiarity with the space or community, or education level.

(5) Whatever other actions the church takes in such cases, the church should always work primarily to assure safety for those who have been assaulted. Church members and officials should cooperate as needed with secular legal authorities to take appropriate action against the assault perpetrator while continuing to provide pastoral and community support for the victim. In situations in which the church also engages in its own disciplinary processes, these should not be used to hinder or interfere with secular criminal processes.

(6) Matthew 22:34-40

(7) 1 John 4:20

(8) 1 Corinthians 12:12-27

(9) BCP p. 305

(10) At the time of writing, TEC does not offer anti-harassment training directly; however, preliminary anti-harassment training materials are currently being created by our Safe Church Training vendor to reflect the guidelines outlined in this guide.

(11) A more detailed list of example behaviors is included in Appendix A.

TASK FORCE TO RESPOND TO THE OPIOID EPIDEMIC

Membership

The Rev. Dina van Klaveren, <i>Chair</i>	Maryland, III	2021
The Rev. Amanda Kotval, <i>Vice-Chair</i>	Virginia, III	2021
Dr. Donna Barten	Western Massachusetts, I	2021
The Rev. Debra Bennett	Ohio, V	2021
The Rev. Jan M. Brown	Southern Virginia, III	2021
Ms. Amy Cochran	Southern Ohio, V	2021
The Rev. Canon Katherine Harrigan	Central Pennsylvania, III	2021
The Rt. Rev. William Klusmeyer	West Virginia, III	2021
The Rev. Dr. Benjamin Nelson	West Texas, VII	2021
The Rt. Rev. Jake Owensby	Western Louisiana, VII	2021
Mr. Merrick Williams	Long Island, II	2021
Ms. Twyla Wilson	North Carolina, IV	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Acknowledgements

We give thanks to Robert Evans and Susan Beares for the administrative support contributed to this Task Force. We also appreciate the support of Patrick Haizel, Brian Murray, and Jennifer Gonzalez in the Executive Office of the General Convention. We appreciate the guidance of Lisa Webb in the Office of Communications and Nancy Davidge in the Public Affairs Office. We are grateful for the work of Jack Cobb at Episcopal Public Policy Network in promoting the CARES act, which supported an expansion of and increased funding for treatment of substance use disorders.

Mandate

2018-C037 Call to Respond to Opioid Epidemic

Resolved, the House of Deputies concurring, That the 79th General Convention call all dioceses and parishes in The Episcopal Church to respond to the opioid epidemic with training, pastoral care, advocacy, and liturgy; and be it further

Resolved, That dioceses and parishes be urged to: partner with First Responders and others in the medical community to host trainings on how to administer naloxone in the event of an overdose; partner with other faith communities and recovery programs in their local contexts to offer pastoral care to those affected by this epidemic; partner with other faith leaders to advocate with local and state government regarding policies and laws to promote healing and wholeness for those affected by this epidemic; and be it further

Resolved, That the 79th General Convention direct the Office of Government Relations of The Episcopal Church to advocate for the federal government of the United States to address this as public health crisis, affirming that opioid use disorder is a disease, which needs adequate resources for treatment options; and be it further

Resolved, That the 79th General Convention direct the Standing Commission on Liturgy and Music to develop additional liturgical resources to address the needs and concerns of those whose lives have been profoundly affected by this epidemic; and be it further

Resolved, That the 79th General Convention concurrently acknowledge the purpose and value of prescription opioid medications in appropriately treating chronic, intractable, pain; or acute pain resulting from curable, short-term medical conditions; and affirm the work of the medical community to create established medical guidelines supporting people living with pain; and call all dioceses and parishes in The Episcopal Church to partner with the medical community and health nonprofit organizations to understand the realities, risks, and barriers to access to care and effective treatments and cures for people living with chronic conditions and otherwise untreated or undertreated pain; and be it further

Resolved, that the Church recognize that issues of substance use disorders, access to diagnosis and effective treatment, and lack of appropriate treatment for untreated or undertreated pain affect all communities, but especially those marginalized in poverty, racial, gender, and ethnic discrimination, persons with disabilities, and other minority communities; and be it further

Resolved, that congregations be urged to include in the Prayers of the People intercessions for patients, families, and communities affected by substance use disorders and also by untreated and undertreated pain and chronic diseases; and be it further

Resolved, That the 79th General Convention to authorize the Presiding Officers to create a task force to assist in the curation and creation of resources for education, prevention, pastoral care, recovery, advocacy, and partnering with community organizations to be use by dioceses and parishes for the purpose of responding to the opioid epidemic and substance use disorders; and be it further

Resolved, That the membership of this task force will be appointed by the Presiding Officers and consist of no fewer than 8 nor more than 14 members; and that the task force be made up of bishops, priests, deacons, and laity; and be it further

Resolved, That the task force will complete this work within two years.

Summary of Work

Meeting Summary

The task force convened its first meeting on May 2, 2019 via Zoom. Work began on the primary set of tasks related to the mandate: "to assist in the curation and creation of resources for education, prevention, pastoral care, recovery, advocacy, and partnering with community organizations to be used by dioceses and parishes for the purpose of responding to the opioid epidemic and substance use disorders..." We identified related tasks and decided to conduct a survey to better understand the needs of clergy and lay leaders regarding education, prevention, pastoral care, recovery, advocacy, and partnering with community organizations. We met again on June 4 and October 3, 2019 to work on resource curation and creation. We determined we would benefit from an in-person work session, and the General Convention office arranged a meeting for us at the Maritime Center in Linthicum, Maryland, on November 5-7, 2019. The website was in process and being updated with relevant resources at the in-person meeting, and the task force continued to meet in small groups on survey analysis and resource collection, curation, and creation.

The meeting scheduled for March 18, 2020, was rescheduled due to COVID-19. The task force met on April 28, 2020, to check in on one another and to share updates about changes in recovery ministries and partnerships due to the pandemic. After a pandemic hiatus, the task force reconvened on November 30th to focus on the following tasks for the coming three months: understand how the COVID-19 pandemic has impacted recovery ministry; continue resource work on the website; complete survey analysis; and draft a resolution for General Convention.

A Plan to Provide Critical Resources

The task force decided on a two-fold approach to the work of the mandate. First, a survey would be conducted with the assistance of the GCO to determine what kind of resources are needed by local congregations and other ministries. Second, a website featuring existing resources curated and organized in easy-to-find categories would be developed and publicized.

Survey Results

The survey was released on October 30, 2019. 527 surveys were returned, including 520 in English, five in Spanish, and two in French. The survey results confirmed and directed efforts to curate and create useful resources on the website, which was the bulk of task force work during the November 5-7, 2019 in-person meeting.

Survey respondents expressed deep concern for individuals and families facing substance use disorder involving opioids/heroin. Many assessed their access to resources as lacking and were eager to utilize resources for education and prevention, especially for children, youth, and families. Respondents identified related issues such as unemployment, violence, homelessness, incarceration, and access to medical care in their communities and seek practical tools from the Church in creating partnerships to transform lives, communities, and systems. Several existing key partnerships and programs throughout the Episcopal Church were identified through the survey, including harm reduction strategies, 501(c)3 recovery centers, liturgical resources, and support strategies for families affected by opioid/heroin use.

The task force appointed a member to follow up with respondents with ministry partnerships and programs to share with the wider Church. These ministries will be highlighted on the website as examples for dioceses and congregations seeking ideas for a ministry of caring and transformational response in the face of the opioid/heroin epidemic.

Website Content Curation

The task force decided early on that the best way to assemble and distribute current resources would be through a website that could be shared across parishes and dioceses. A website would also allow for ease of updating as needed, without the expense of printing or mailing. At the November 2019 meeting, the task force worked together to find online resources for each area the mandate addresses, including the addition of resources to help find treatment in individual localities. These resources were added to the website, which can be accessed at:

<https://sites.google.com/view/opioid-task-force>

At the meeting in November 2020, the task force also noted a need to provide resources on how the opioid/heroin epidemics affect people and communities of color, as well as how the work of responding to these crises has changed since the arrival of the COVID-19 pandemic. These resources are to be added to the website.

Remaining Work

The website content is still in progress. The task force looks forward to completing this work by April 1, 2021 and releasing a press release about the survey results and the website's critical content and availability. The task force also plans to submit a resolution to the next General Convention in regard to promoting the resources via diocesan websites, encouraging Recovery Ally Training for clergy and lay leaders throughout the Church, maintaining the resources that were curated and created by this task force so that the resources continue to save lives, reducing stigma/discrimination, and supporting families/communities.

Proposed resolutions

A090 Allies for Recovery in the Episcopal Church

Resolved, the House of _____ concurring, That the 80th General Convention urge all dioceses and parishes in The Episcopal Church to include www.generalconvention.org/sites/opioid-task-force on websites and encourage training, advocacy, and pastoral care resources for individuals, families, and communities affected by opioid addiction; and be it further

Resolved, that dioceses and parishes designate persons within their region to be trained as Recovery Allies, encourage Naloxone training for members, and disseminate the SAMSHA Toolkit (available on website) to clergy and lay leaders; and be it further

Resolved, that the 80th General Convention direct the Office of Government Relations of The Episcopal Church to continue advocacy for the federal government of the United States to address this as public health crisis, affirming that opioid use disorder is a disease, which needs adequate resources for treatment options; and be it further

Resolved, that the Church recognize that issues of substance use disorders, access to diagnosis and effective treatment, and lack of appropriate treatment for untreated or undertreated pain affect all communities, and there is a disproportionate effect on persons of color, persons with disabilities, and those affected by poverty; and be it further

Resolved, that congregations be urged to pray weekly during the Prayers of the People for those affected by substance use disorders and their families; and be it further

Resolved, that the General Convention designate an existing office to oversee website management, partner with seminaries and other organizations for Recovery Ally training, and be it further

Resolved, that the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$40,000 for implementation of this resolution.

EXPLANATION

The 2018-C037 Task Force on Responding to the Opioid Epidemic met over the course of 2.5 years to create resources, explore best ways for dioceses and parishes to respond pastorally and as advocates for recovery, and to conduct a survey of response needs throughout the church. Based on the survey, research, and meetings of the task force members, there is a need for useful science-based strategies for combating the disease of addiction in communities. As many survey respondents noted a need for resources and training to better support the recovery needs in their communities, the Task Force curated resources and encouraged those engaged in Ally Training opportunities. Seabury Seminary is offering an online Recovery Ally Training in the Spring of 2021,

and the Task Force encourages similar offerings throughout the Church. Additionally, the Task Force encourages all congregations to include intercessions for those in recovery as a part of weekly worship to eliminate stigma and create safe space for families and individuals in recovery.

The following steps are recommended for continuing a robust response to the epidemic of opioid addiction:

- (i) all diocesan and parish websites contain a link to the website created by the task force: www.generalconvention.org/sites/opioid-task-force ,
- (ii) the management of the website and the administration of Recovery Ally Training be designated to existing offices or standing committees,
- (iii) resources be allotted to the offices or standing committees designated with the task of maintaining the website and administering the training.

Much of the work of this Task Force was completed before the COVID-19 pandemic. The public health crisis has intensified the effects of opioid addiction and these recommendations are even more critical as communities face the trauma of loss and seek to care for our siblings in active addiction or in recovery.

TASK FORCE TO STUDY SEXISM IN THE EPISCOPAL CHURCH & DEVELOP ANTI-SEXISM TRAINING

Membership

Ms. Laura Russell, <i>Chair</i>	Newark, II	2021
The Rt. Rev. J. Scott Mayer, <i>Vice-Chair</i>	Northwest Texas, VII	2021
The Rev. Dr. Helen Svoboda-Barber, <i>Secretary</i>	North Carolina, IV	2021
The Rt. Rev. Mark Beckwith	Newark, II	2021
The Rev. Brooks Cato	Central New York, II	2021
Dr. John Harris	Oklahoma, VII	2021
The Rev. Spencer Hatcher	Maryland, III	2021
The Rt. Rev. Michael Buerkel Hunn	Rio Grande, VII	2021
The Rev. Tracy Johnson Russell	Connecticut, I	2021
Dr. Katherine Karr-Cornejo	Spokane, VIII	2021
Dr. Alexandra Killewald	Massachusetts, I	2021
The Rev. Yein Kim	Los Angeles, VIII	2021
Ms. Sophia Kitch-Peck	Bethlehem, III	2021
Ms. Katie Sherrod	The Episcopal Church in North Texas, VII	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

The Rt. Rev. Susan Snook Brown resigned on Feb. 7, 2019 after her election to the episcopate and was replaced by The Rev. Spencer Hatcher on Feb. 12, 2019.

Representation at General Convention

Task Force members Spencer Hatcher and Laura Russell are authorized to receive non-substantive amendments to this report at General Convention.

Mandate

2018-Co60 and 2018-Do23 2018-Co60 Breaking the Episcopal Stained Glass Ceiling

Resolved, the House of Deputies concurring, That the 79th General Convention of the Episcopal Church authorize a task force with a membership of twelve members consisting of 3 bishops, 3 priests or deacons and 6 lay persons, including at least two young adults, appointed by the President of the House of Deputies and Presiding Bishop, of which women shall compose at least half of the membership, to research sexism in The Episcopal Church, and the role it plays in pay equity, status, and gender-based harassment. The task force shall report back to the 80th General Convention of the Episcopal Church with a plan to provide materials and resources to combat sexism in the Church.

2018-Do23 Amend Canons III.6.5.g.4, III.8.5.h.4, and III.10.1.c.4 and Establish Task Force

Resolved, That the 79th General Convention establish an Anti-Sexism Task Force to research and develop a training program for the purpose of addressing the systemic sexism within the church and the larger society with the goals of raising awareness of bias, eliminating sexist hiring practices within the church, and identifying intersectionalities of discrimination across multiple cultural identities; and, be it further

Resolved, That the Task Force be appointed consisting of 2 bishops, 2 priests, 2 deacons, and 6 lay persons, with the Presiding Bishop appointing the bishop members, and the President of the House of Deputies appointing the priests, deacons, and lay members. At least one half will be women with at least one woman appointed for each of the orders; and, be it further

Resolved, That the Task Force complete development of the training program by December 31, 2019; and be it further

Resolved, That the Task Force shall submit the training program to Executive Council for its approval by December 31, 2019; and be it further

Resolved, That the training, once developed and approved for use, be required for all bishops, priests and deacons, and all lay persons elected or appointed to leadership in The Episcopal Church including, but not limited to, Executive Council, diocesan Standing Committees, diocesan Councils, diocesan Boards of Trustee, and similar bodies by whatever name, diocesan search committees for the election of bishops and all congregational search committees; and be it further

Resolved, That this Task Force shall report to Executive Council yearly, and to the 80th General Convention on the status of the training implementation with recommendations for continued development and improvement.

Summary of Work

Meetings

Meetings of the entire Task Force were held in-person on March 19-21st, 2019 in Chicago, Illinois and via Zoom video conferencing on January 3rd 2019, May 16th 2019, June 18th 2019, November 4th, 2019, December 19th 2019, January 21st 2020, January 30th 2020, October 15th 2020, December 22, 2020 and January 13th 2021. Subcommittees of the Task Force also met at additional times to complete their work.

Why do this work?

“In the beginning when God created the heavens and the earth, the earth was a formless void and darkness covered the face of the deep, while a wind from God swept over the face of the waters... Then God said, let us make humankind in our image, according to our likeness... so God created humankind in [God’s] image, in the image of God, [God] created them... God saw everything [God] had made, and indeed, it was very good⁽¹⁾”

The work of the Taskforce to Study Sexism in The Episcopal Church and to develop an anti-sexism training is rooted in God’s act of creation and in God’s continued saving action in that creation, inviting us time and time again, though the process of repentance and reconciliation, towards wholeness and liberation; towards a creation truly made in God’s own image. We remember this narrative of God’s saving acts in the words of Eucharistic Prayer C: “Again and again, you called us to return. Through prophets and sages you revealed your righteous Law. And in the fullness of time you sent your only Son, born of a woman, to fulfill your Law, to open for us the way of freedom and peace.⁽²⁾”

In our Baptismal Covenant, with God’s help, we promise to “persevere in resisting evil, and whenever [we] fall into sin, repent and return to the Lord.⁽³⁾” We covenant to “seek and serve Christ in all persons⁽⁴⁾” and to “strive for justice and peace among all people and respect the dignity of every human being.⁽⁵⁾” And yet, we also know that we have fallen short of these commitments made to God and to one another, both as individuals and as an institution. We have “denied [God’s] goodness in ourselves, in each other, and in the world [God has] created.”⁽⁶⁾

Systemic and intersectional sexism and gender-based discrimination is just one way in which we fall short. It is our hope that, incomplete as it may be, the offering of this Taskforce is one way the Episcopal Church might seek to “repent and return to the Lord” through an intentional process of learning, dialogue, truth-telling, and policy change at all levels of our institution. We believe that God

continues to call us to return here and now and that our vocation as the people of God is to hear and respond to that call to the best of our abilities.

Work on 2018-Co60 Breaking the Episcopal Stained Glass Ceiling

Identifying the Problem

Evidence of gender inequality and sexism in The Episcopal Church comes from multiple sources. The report “Called to Serve: A Study of Clergy Careers, Clergy Wellness, and Clergy Women” was prepared as a result of resolutions passed by General Convention in 2006. Though the data contained in the report need to be updated to reflect the church today, many of the issues flagged by the report remain, especially in regards to gender disparities in compensation, employment, and employment in the episcopate and other positions of relative prestige.⁽⁷⁾

“The 2019 Episcopal Clergy Compensation Report,” produced by the Church Pension Group, shows that the typical (median) male clergy member earns about \$9,000 more annually than his female counterpart. Put differently, the typical female clergy member earns about 89 cents for every dollar her male counterpart earns.⁽⁸⁾

Domestically, Provinces VII and I show the most pronounced pay disparity with the typical male clergy member receiving more than \$14,000 per year more than the typical female clergy member.⁽⁹⁾ In these provinces, the typical female clergy member earns about 81 (Province VII) and 83 (Province I) cents for every dollar earned by the typical male clergy member. Province VIII is the most equitable domestically, but the typical male clergy member still receives nearly \$5,000 per year more than the typical female clergy member. Congregations with the highest Average Sunday Attendance, the Program and Resource-sized Parishes, domestically, have the highest disparity in annual compensation, with the typical male clergy member receiving about \$30,000 to \$35,000 more than the typical female clergy member.

The pay disparities are not limited to Dioceses. At The Episcopal Church Center, currently, there is only one female Officer, and of the principle employees, only 30% are female. Combining Officers and Principal Employees, women hold only slightly more than 25% of these positions. The majority of these positions, some of the highest paid positions at The Episcopal Church Center, are occupied by men.

Gender differences in position type are one contributor to pay disparities: domestically, male clergy are about twice as likely to be employed as senior rectors (15% vs. 8% of female clergy), while female clergy are overrepresented as assistants (21% vs. 14% of male clergy). Narrowing the gender pay gap

among clergy will require attention both to equitable pay for those in similar positions and equal access to high-paying positions. Some dioceses have attempted to address pay inequity, and this Task Force encourages ongoing conversation with those dioceses to observe how effective their efforts prove to be over time.

In addition to statistics regarding clergy compensation, stories from the #MeToo and #ChurchToo movements have shed light on how sexism manifests in our churches and our church structure, from harassment and abuse in church settings to disparities in the hiring process. Many men in the church expressed shock at the number of stories emerging from their colleagues and fellow parishioners, while many women saw their own stories affirmed by the experiences of others. The church as a whole is learning just how pervasive sexism is, and we are seeing how it affects people of all genders, not solely women. Slates of all-female Bishop nominations bring additional sexist attitudes, stating an all-female slate is not appropriate. We do not see these outcries with all male slates. In addition, the intersectional realities of those who identify as women provide further evidence of the many places and moments the church has failed to live into its promises to protect its flock, respect the dignity of every human being, and seek Christ in all persons.

Work in Progress

Many groups and individuals are working to address sexism and gender inequality in The Church.

People within the church are taking notice and demanding change. The House of Deputies Committee on Sexual Harassment and Exploitation and the Liturgy of Listening from the 79th General Convention are examples of this work happening on a legislative level. From the grassroots, groups like Women Embodying Executive Leadership (WEEL) and Leading Women have been birthed to support and encourage ordained women in discernment for senior level positions through the church.

Women have come forward to, through social media and other forums, to help break the stained glass ceiling. Groups on Facebook, and other platforms, help each other, not only by sharing stories, but also by giving guidance and encouragement to those who feel called to senior positions. These groups, created by women and for women, are helping to call out sexism and guide women to their callings.

Institutional Church actors are also working to reduce sexism and gender inequality in The Church. The Office of Transition Ministry is working with search committees and provides trainings aimed at addressing sexism within the search process. Some dioceses are doing internal audits looking at gender and representation. Bishop trainings regarding sexism are also underway. Efforts to collect

and share data are also ongoing. The Church Pension Group has begun to enhance their data reporting on gender, dioceses are improving their ability to share information, and historical documents are more readily available.

Next Steps

The topic of sexism is so great that the work of Resolution 2018-C060 cannot be completed in a single triennium. Conversations that have only just begun must continue, and more information must be collected and made available to bring us closer to the justice we seek for all people, especially in the church.

One of the challenges to documenting and disrupting sexism and gender inequality in the church is a lack of coordinated resources and data. While many parishes, dioceses, church-wide entities, and groups are seeking to address these issues, discovering these efforts often requires being “in the know” and personal connections. This makes it challenging for interested individuals to know how to find information about pay disparities in their diocese or templates for equitable search processes or where they might find support. We strongly urge The Episcopal Church to create a single, centralized web dashboard with links to these resources.

Although the Church Pension Group provides excellent data on gender disparities in pay among clergy working in the United States, other pay information is much less readily available. Data on gender disparities in clergy salaries for those working outside the United States is not publicly available. Additionally, level of compensation is not readily available for the laity. As a start, we urge dioceses to collect information on lay staff compensation at both the parish and diocesan level and to inspect these data for gender inequalities. The Church has a responsibility to ensure pay equity of all its employees, not only the ordained.

We also urge additional analyses of the pay data that are already available. The Church Pension Group provides important information about gender pay disparities by characteristics including position and province, but the joint roles of these factors are typically not analyzed. Thus, at this time we are not able to assess the relative contributions to the gender pay gap of variation in experience, variation in placement conditional on experience, and variation in pay conditional on position. Understanding the underlying processes contributing to gender pay disparities will allow the Church to intervene more effectively to reduce them. We urge the church to fund a deeper analysis of the Church Pension Group data, either conducted by Church Pension Group employees or designed by an outside analyst (and, if necessary, implemented by Church Pension Group employees to avoid sharing the underlying, confidential data).

Understanding the full scope of gender inequality and sexism in the church also requires data other than compensation. There is very limited data regarding the status of women in positions of power. It would benefit the church to have full data on the gender of those in charge of Cardinal parishes and cathedrals. Likewise, the church has not collected data on the number of lay women who are wardens or serve on vestries, search committees, boards, standing committees, commissions on ministry, as Chancellors, or bishop's councils and diocesan boards. There is very little information covering hiring practices and search committee policies from parish-to-parish and diocese-to-diocese. Additionally, we could not find information reflecting the number of women who are finalists in job searches or who occupy leadership roles in seminaries.

In addition, there is limited information available regarding Title IV complaints of gender-based harassment. Dioceses have disparate systems for handling harassment complaints, there is no database of harassment policies for all dioceses, most knowledge around harassment complaints comes from hearsay and rumor (and is not always correct). Without this information it is very difficult to determine if the church as a whole encourages or allows a hostile environment. We do, however, applaud Resolution 2018-A120, which calls for the creation, administration, and maintenance of “a central database registry to track data pertinent to proceedings under this Title [IV]” and recognize the potential it holds for future study.

We recognize that gender inequality and sexism will take different forms in different places. Thus, addressing sexism will require not only action by this task force and The Episcopal Church, but by diocesan and congregational leaders. We ask that all bodies and groups of this church be required to examine their own composition, discuss the gaps, and create plans to narrow those gaps. Leadership should be having these conversations, should explain the problems, and work along with these bodies to correct what is broken in our church.

To continue its work, this task force needs more data and needs the partnership of The Church in collecting these data and making them centrally available. Talking about the issue of sexism in the church and gathering this data will help to normalize conversations around a subject that has been taboo for far too long. It should be the norm that these conversations inform the work we do in the church, from the creation of slates to discussions with clergy and lay leaders about toxic environments. With all due sensitivity, this data — along with the stories that accompany the data — must be collected, available, and shared. With these data and the stories told, the church will be better positioned to hold people accountable, to monitor and work to improve pay gaps, complaints, and the gender composition of leadership bodies.

Work on 2018-Do23: Amend Canons III.6.5.g.4, III.8.5.h.4, and III.10.1.c.4 and Establish Task Force

This mandate revolved around creating an anti-sexism training, that would be presented to Executive Council for approval and promulgation. For the Task Force to better understand the mandate to create anti-sexism training, we began by reaching out to the wider church to discuss trainings in general to learn what has been effective, what would be used, and any lessons others could teach us from the past. We quickly realized several key points regarding church trainings in general:

- People are in different places, both literally and figuratively, and must be met there
- Begin with the basics
- Trainings need to fit into already existing schedules that are often quite full
- Multiple modes of delivery, such as in-person, as well as synchronous and asynchronous online options, are important
- Adaptable modules are most effective
- Accountability is key to performance and compliance
- Sexism varies from diocese to diocese and from setting to setting

Taking the example of meeting people where they are, we reflected on scheduling programs and trainings. If you do not begin with a shared understanding of terms, progress cannot be made. If you expect participants to spend 8 hours for an in-person training with a 2-hour one-way commute, participants are less likely to come and, if they do, are less likely to be engaged in transformative learning during the time they are present. Church groups should be able to take these trainings before a meeting or online in multiple, small segments. These trainings should be adaptable to each diocese. Local facilitation, rather than a nationwide group of trainers, allows for greater flexibility for those undergoing the training and is more cost-effective for all. Pedagogically, trainings should include multiple types of input and modes of instruction and learning.

Finally, we learned that trainings had to be easy to use. Church members (whether lay or clergy) are busy. Though they are eager to learn and change when needed, they also do not have the time to create and host trainings so something that could be used with very little preparation that maintained effectiveness is desired.

The Task Force, with all this information in mind, decided the best training we could create was a modular one which would allow flexibility for time and context and make it more likely that the

trainings would be used. These training modules could be done before an already-scheduled meeting and could be led by coordinators with minimal preparation. Modules allow groups to choose their path through the training and to complete it in their own time. Our goal was to make it as accessible as possible to groups who we know are already heavily committed. Given that these church bodies have a shared purpose and often will have already built trust and relationships together, these trainings will leverage that community to allow a safer space for growth for participants.

We therefore created ten modules (in English only at this point) as a proof of concept. We believe these modules are the beginning of a complete anti-sexism training which would consist of assorted modules, each under one hour, that respond to specific competencies that the Task Force identified as necessary for this work. These competencies focus on participant objectives related to definitions and terminology, reflective practices, best practices, and the role of the participant in the transformative work of the Church. Specific learning outcomes are detailed in the modules. Eventually, the goal is to have different sets of modular training; for example, trainings for search committees; trainings about sexism and intersectionality; and trainings to understand how women of color experience sexism differently than white women; among others. Groups would be able to choose from different categories, so that they would be required to take a certain number of modules in each category to have completed the training satisfactorily.

The modules that we have proposed so far teach the basic concepts of sexism and gender bias, how scripture can be misused to continue sexist beliefs, and how our baptism teaches us to honor all people. The trainings each have a learning component as well as a conversation piece, and the host (or trainer) needs only to review the materials in advance. They can be used by any group, before or after a meeting, and at any time. The goal of these trainings was to create the beginning framework of an anti-sexism course. They can be rolled out as they are since they are the beginning of the framework. Other modules can be added in time, with specific groups in mind. Eventually, more advanced modules can also be added, so those who have taken the basic framework can then move to more advanced courses.

We feel they are a cumulative effort of our work to show General Convention a plan forward to teach gender bias, and to work together to eliminate sexism. We envision next steps including pilot programs in several dioceses and the creation of a structure for ongoing assessment of effectiveness of the trainings.

We have presented these to Executive Council and hope they will embrace our plan and continue by creating more modules that can expand on our work and enhance these already created trainings. Since our Task Force is due to sunset this triennium, we ask that a Task Force be appointed and

charged with both creating more training modules and implementing the current modules, once approved by Executive Council, in the next triennium.

We heard from many groups within the church involved with formation and training that without a mechanism to track who has been trained, the trainings fall off the radar, and there is limited to no accountability. This mechanism for accountability should be linked to other required trainings for deputies and church leaders. There should be a group that is charged with confirming that all church leaders have taken the requisite number of modules to complete an appropriate level of training.

Our goal is to use all this gathered information and the future modeled behavior from leadership to deploy this task force's training modules, report back to the committee with feedback on the process, improve the training in time, and, ultimately, to build awareness that leads to true change at every level of The Episcopal Church.

Conclusion

There is a lot of work going on around the issue of sexism in The Episcopal Church and how to combat the gender inequities that continue to persist, but information is not all easily accessible. Disparate groups within the church are collecting data, but currently, there is no centralized, easily accessible bank of data. Even given all this work, there is still considerably more data to collect to fully understand sexism and the role it plays in The Episcopal Church. At this time, we are unable to compare the presence of sexism within the church to the secular world; we don't know if we are better, the same, or worse than the rest of society. However, we believe that if we're only on par with the rest of society, we're not doing what we're supposed to be doing as a church body. We should be leading on this, not mirroring or even trailing behind. Episcopalians can continue to work to stop sexism by calling it out, engaging in trainings, taking it out of the shadows, talking about it whenever and wherever it exists, and following best practices for leadership appointments, hiring, and compensation. The newly created training modules will help with this, but for a robust and more complete offering, continued work is necessary to develop additional modules, monitor their effectiveness, and develop additional interventions to reduce sexism within the church. We request that this Task Force continue its work in order to expand and continue the study of sexism, attempt to obtain and centralize more data, and to continue to develop the trainings and monitor their efficacy. We further recommend that these tasks be divided among multiple bodies in the next triennium: the work of creating educational materials and the work of collecting and analyzing data are both substantial and would benefit from focused attention by two distinct groups.

End Notes

- (1) Genesis 1:1-2, 26a, 27 a, 31, NRSV
- (2) Eucharistic Prayer C, Book of Common Prayer, 1982, pg. 370
- (3) Holy Baptism, Book of Common Prayer, 1982, pg. 304
- (4) Holy Baptism, Book of Common Prayer, 1982, pg. 305
- (5) Holy Baptism, Book of Common Prayer, 1982, pg. 305
- (6) Enriching Our Worship 1, 1998, pg. 56
- (7) <https://www.cpg.org/globalassets/documents/publications/called-to-serve-a-study-of-clergy-careers-clergy-wellness-and-clergy-women.pdf>
- (8) Church Pension Group. 2020. The 2019 Episcopal Clergy Compensation Report: A Geographic and Demographic Analysis of Clergy Compensation. <https://www.cpg.org/globalassets/documents/publications/report-2019-church-compensation-report.pdf>
- (9) Church Pension Group. 2020. The 20219 Episcopal Clergy Compensation Report: An Interactive Tool <https://www.cpg.org/global/research/clergy-compensation-report/#/start>

Proposed resolutions

A061 Amend Canon I.4.6.j to include data regarding gender

Resolved, the House of ____ concurring, that the 80th General Convention amend Canon I.4.6.j by the addition of a second sentence, as follows:

Canon 1.4.6.j

j. Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council. *Such Diocesan report shall include demographic information, such as gender, age and race, for the following positions: Standing Committee, Bishop Search Committee (if any), Chancellor and Vice-Chancellors, Trustees, all Wardens and Vestries.*

EXPLANATION

The Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training, during its work, continually found a lack of consolidated information regarding the demographics, especially gender, on diocesan positions. One of the challenges to disrupting sexism and gender inequality in the church is a lack of coordinated data. Though Church Pension Group has begun to collect data on clergy compensation and roles, there is no collection of data on either lay participation in senior positions, nor on demographics of key positions in a diocese or parish. To disturb the status quo, and work towards gender equality, we must see what currently exists. By requiring dioceses to report this information, we can create a consolidated source of information by which we can study the disparities and make meaningful recommendations.

A062 Requiring Dioceses to Create a Plan to Narrow Gender Gaps

Resolved, the House of ____ concurring, that the 80th General Convention require each Diocese to submit to the 81st General Convention a plan to narrow the gender equity gaps which exist in their Diocese; and be it further

Resolved, that this plan shall be created after careful examination into the composition of diocesan bodies, gender pay equity of both clergy and lay, and the demographics of parish leadership, including any search committees.

EXPLANATION

The Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training realized during their work that each Diocese must commit to combat gender inequality. We commend the few dioceses who have done work to understand the gender disparities in their own dioceses. We recommend that each Diocese be required to examine the composition of their bodies of leadership, understand the dynamics of gender at play with each, and to create a plan to narrow any gender equity gaps. Each diocese is different, and therefore they must create their own plan. No one body can undertake to do this for every diocese, so this must come from the diocese. The plan, which should be reflective of where the diocese currently stands on gender equality, should be created by the diocese and then submitted to the next General Convention.

A063 Creation of a Director of Women’s Ministries

Resolved, the House of ____ concurring, that the 80th General Convention direct the Domestic and Foreign Missionary Society to establish a staff position of Director of Women’s Ministries; and be it further

Resolved, that this staff person be empowered to create networks to train and mobilize women leaders, both lay and ordained; and to collect any data relevant to gender equality within The Episcopal Church.

EXPLANATION

When the position commonly referred to as the “Women’s Desk” was eliminated, The Episcopal Church lost a place for women to go to when seeking assistance with gender equality issues. There was no longer a repository of data regarding gender equality, a human “dashboard” of programs for gender equality, or a place to ask a question regarding women in the church. Though other positions are still in existence; a position dedicated to women’s issues has never been recreated. Throughout

this triennium, the Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training continually found the need for a more consolidated effort on data around women's issues. From the lack of gender data on lay leadership, to templates to equitable search processes, to how to find support for gender equality, there is no central location or person coordinating these areas. We are asking dioceses to create plans for gender equality, but there is no staff to assist them. If we want to disrupt sexism, we must create a coordinated response along with accurate data. The Episcopal Church is committed to gender equality, and therefore should fund a staff person, not only to show their commitment, but to help empower women within the church.

Continuance recommendation

The Task Force to Study Sexism in The Episcopal Church and Develop Anti-Sexism Training recommends a continuing opportunity to collect and study data to more fully understand sexism within The Episcopal Church over the coming triennium. To that end, the task force will need to be repopulated with current and/or new members to meet, collect and analyze data, roll out trial training sessions to be implemented by another body, and respond to feedback to further develop training modules.