

## TASK FORCE ON THE EPISCOPACY

### Membership

The Rt. Rev. Ian T. Douglas, <i>Chair</i>	Connecticut, I	2018
Thomas A. Little, Esq., <i>Secretary</i>	Vermont, I	2018
The Rev. Canon Gary Hall	Los Angeles, VIII	2018
Ms. Sally A. Johnson, Esq.	Minnesota, VI	2018
Alexandra Killewald, Ph.D.	Massachusetts, I	2018
The Rt. Rev. Michael P. Milliken	Western Kansas, VII	2018
The Rt. Rev. Sean W. Rowe	N. Western Pennsylvania, III	2018
Ms. Lynn V. Schmissrauter, <i>Transition Consultant</i>	East Tennessee, IV	2018
Ms. Katie Sherrod	Fort Worth, VII	2018
The Rev. Lenore K. (Nora) Smith	New York, II	2018
Mr. Lee Davis Thames, Esq.	Mississippi, IV	2018
The Rev. Dr. William C. Treadwell, III	Texas, VII	2018
The Rev. Sharon A. Alexander	Louisiana, IV	2018
The Rt. Rev. Don Johnson	West Tennessee, IV	2018
The Most Rev. Michael Bruce Curry, <i>Ex-Officio</i>	North Carolina, IV	2018
The Rev. Gay Clark Jennings, <i>Ex-Officio</i>	Ohio, V	2018

### CHANGES IN MEMBERSHIP

The Rev. Sierra Wilkinson Reyes resigned from the Task Force on January 19, 2017, and was replaced by the Rev. Nora Smith. The Rev. Sharon Alexander served as the non-voting representative of the President of the House of Deputies. The Rt. Rev. Don Johnson served as the non-voting representative of the Presiding Bishop.

The Task Force acknowledges that its membership was not racially or ethnically diverse. The Task Force was mindful of the absence of these voices. At the beginning of its work, the Task Force engaged VISIONS, Inc., a non-profit training and consulting organization specializing in diversity and inclusion. The Task Force also carefully considered matters of diversity in its thought processes and discussions.

## Mandate

### **2015–D004 Create a Task Force to Study Episcopal Elections and Appointments of Bishops**

*Resolved*, the House of Bishops concurring, that a Task Force on the Episcopacy be appointed by the Presiding Officers composed of three (3) bishops, three (3) presbyters or deacons, and six (6) lay persons; and be it further

*Resolved*, that at least one (1) member of the Task Force will have been a finalist in an Episcopal search who did not receive enough votes for election in the last three (3) years; at least one (1) member of the Task Force will have served as a Transition Consultant in an Episcopal search over the past three (3) years; and at least two (2) members of the Task Force will have served on an Episcopal Search and/or Transition Committee in an Episcopal search process over the past three (3) years; and be it further

*Resolved*, that the Task Force will study the election, appointment, roles, and responsibilities of the Episcopate, including the use of Bishops Diocesan, Bishops Coadjutor, Bishops Suffragan, Provisional Bishops, Missionary Bishops and Assistant Bishops in this Church; looking specifically at the particular gifts, life experience, and expertise required for episcopal office; and be it further

*Resolved*, that the Task Force will pay particular attention to the recent trend away from a diverse House of Bishop, and seek ways to encourage diversity in the Episcopate; and be it further

*Resolved*, that the Task Force will propose to the 79th General Convention a new process for discernment, nomination, formation, search, election and transition of bishops in The Episcopal Church including, but not limited to: the roles and responsibilities of the Office of Pastoral Development; the selection of, roles and responsibilities of Transition Consultants; how adjoining dioceses may aid and inform the discernment of a diocese in transition; and any required Constitutional and Canonical changes necessary; and be it further

*Resolved*, That the Task Force will work with the Office of Pastoral Development to develop best practices and educational materials to be published electronically and made publicly available, and may use some of its budget to retain consultants who will help with this task; 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 \$150,000 for the implementation of this resolution.

## Summary of Work

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Acknowledgements

## **I. INTRODUCTION**

### **A. Executive Summary**

#### ***I. Task Force Origins***

The Task Force on the Episcopacy (the “Task Force”) was established under Resolution D004, adopted by the 2015 General Convention and should be understood in the context of a continuum of discernment and dialogue about how the Church understands its needs and preferences for its leadership, including the episcopate, and for governing itself through the participation of all orders of ministry.

#### ***II. The Roles and Responsibilities of Bishops***

From its inception The Episcopal Church has affirmed the central role of bishops in its theology, leadership, and function. The purpose and function of a bishop is set forth in the Rite for the Ordination of a Bishop in the *Book of Common Prayer*: the people of the church choose bishops, a bishop “is 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 lords and King of kings.” *Book of Common Prayer*, p. 517.

In 1835 the General Convention articulated a new understanding of the episcopate, stating that if the Church is first and foremost a missionary society, and if every baptized person is called to a life of mission, then the bishop is to be the chief missionary. A key question has always been, continues to be today, and going forward will be: what are the different contexts in which the bishop is called to be the chief missionary?

The Episcopal Church takes discernment to Holy Orders seriously. However, there is no formal process in place for a person to test an initial call to the episcopate as an order similar to the work done in discerning the diaconate or the priesthood. While the accepted process for the ultimate affirmation of the call is a public election (and we are making no call to change that), it is absent the prolonged, informed, prayerful process that we employ for a call to the diaconate or priesthood. We are concerned about that absence.

The Task Force proposes the establishment of a voluntary process by which people may ask questions about a possible call to the episcopate before entering into dialogue with a particular diocese. A process of vocational discernment that takes place before the individual determines to place their name into an episcopal search process would permit more people throughout the church to safely and confidentially seek clarity for themselves.

We envision a process where the result is clarity for the seeker, and not the conclusion of a group as to whether this individual ought to put him or herself forward. This discernment is not pre-vetting. It is a pastoral response to an individual who seeks a safe place to wonder about a specific call. The result of the experience and what to do with the information is solely up to the individual.

### ***III. Diversity***

The Task Force values the diverse perspectives of its clergy and affirms the importance of reducing barriers to women and people of color entering the episcopate. Bishops are overwhelmingly male and white. In dioceses in the United States women comprise only 6.5 percent of active Bishops Diocesan. Women comprise fifty-five (55) percent of Episcopalians in the United States, and are therefore greatly underrepresented. The clear majority, 90 percent, of active Bishops Diocesan in United States dioceses are white. People of color, while not underrepresented among bishops compared to their representation among the membership of The Episcopal Church, of which 90 percent of its members in the United States are white, have low representation in absolute terms.

We seek a more diverse episcopate because it reflects the Kingdom of God, because it is collectively beneficial, because it is inclusive, and because we believe it is just.

Fostering a diverse episcopate will require effort at both the Church wide and diocesan levels. Dioceses in a search for a bishop, the greater Church, and dioceses not actively seeking a bishop can each support diversification. Search and election processes can disadvantage some applicants because of their race, gender, or other identities, even in the absence of any malicious or discriminatory intent. Because our biases can be hard for us to see, it is dangerous to rely on our own good intentions to eliminate them.

Lack of appropriate data substantially undermines current efforts to diversify the episcopate. A primary recommendation of this Task Force is that the Church enhance data collection, including requiring dioceses holding episcopal elections to report demographic characteristics of the applicant pool, finalists, and elected bishop. These data will allow more empirically-grounded, evidence-based recommendations for enhancing the diversity of the episcopate in future years.

In this report, we discuss possible steps toward greater diversity in the episcopate and make recommendations for dioceses during their search for a bishop as well as ways that both the whole Church and dioceses not actively seeking a bishop can support diversification.

#### ***IV. Missional Review and the Search and Election Processes***

At its outset and as prompted by Resolution D004 from the 2015 General Convention, the Task Force took a fresh look at how bishops might and should be chosen. We came to a strong consensus that for many reasons (including of polity, history and the vital engagement of all orders of ministry), the selection of bishops should continue to be by election, with the electing diocese continuing to have the primary responsibility for the process. In the Task Force’s view, General Convention should provide guidance for dioceses to address issues in their local canons that relate to the entire episcopal election and transition process.

The Task Force is proposing that before initiating an episcopal election process for a diocesan, suffragan or assistant bishop (and also before a Missionary Diocese begins the process for calling a Missionary Bishop), a diocese must conduct a “missional review.” Missional review finds its origins in Resolution A002 (GC 2015) which says, in part, “that within each bishop-search process, a mandatory time of discernment with the Standing Committee of the diocese in transition occur with the Standing Committees and bishops of adjoining dioceses”. The missional review could (and arguably should), in fact, begin prior to the departure of the current Bishop Diocesan.

Responsibility for providing Church wide support and materials (and, where agreeable to a diocese, oversight) to electing dioceses should continue to be one of the responsibilities of the Office for Pastoral Development [OPD] in the Office of the Presiding Bishop. In its charge to the Task Force, however, the General Convention recognized the need to examine and consider overhauling the current system of episcopal search, election and transition processes. As the Task Force proposes, that responsibility should be exercised in collaboration with a new pilot “Board for Episcopal Transitions.” Together, the pilot Board and the OPD should look at improving the formal structure and frequency cycle for revisions of supporting materials.

#### **Background, Psychological, and Medical Screening**

Currently no canons, rules, policies, guidelines, or processes set by General Convention govern background, psychological, and medical screening prior to nomination for election as a bishop. There is no Church wide canonical requirement for background screening when a diocese elects a bishop. There is no office or body charged by General Convention with developing standards or even guidelines for voluntary screening or for the screening required by the seldom used process in Canon III.11.1(b).

There are no canons, guidelines, or standards, nor any office or body charged by General Convention that address the review, evaluation, or sharing of information gathered in the episcopal search process, including but not limited to the background screening and any psychological or medical screening a diocese conducts prior to an episcopal election.

There is confusion and a lack of clarity concerning who has the right or responsibility to review background screening results, determine who else should see it or be informed of its contents, and evaluate and/or make decisions about it.

If information is obtained in the election process that raises concerns, but does not result in the person being discontinued in the process, there is no guidance or standards on with whom the information should be shared. The above concerns have led to failed searches and elections, and the election of seriously compromised candidates.

Conducting medical and psychological screening after an election is not sufficient and the current canonical requirement is inadequate.

Below, in the pertinent section, the Task Force recommends a canonical remedy for certain of these issues and recommends study of others.

#### ***V. Formation for the Ministry of Bishops***

Canons III.12.1 and III.12.2 make the House of Bishops responsible for the initial three (3) years of formation of bishops and for their continuing education. The currently authorized process and resources are provided largely through the Rt. Rev. David E. and Helen R. Richards College for Bishops (the “College for Bishops”).

The College for Bishops is a separately incorporated non-profit established by the House of Bishops. Currently, the Presiding Bishop nominates the Board of Directors for the College with election by the House of Bishops. The Presiding Bishop is *ex-officio* Chair of the Board. The College employs its own Managing Director.

Given that bishops are bishops for the whole Church, the Task Force believes that all orders of the Church’s ministry should be more involved in the formation of bishops. We offer a resolution regarding the reorganization of the Board of Directors of the College for Bishops to that end.

#### ***VI. Other Canonical and Structural Considerations***

The Task Force on the Episcopacy offers a number of canonical and structural changes, including clarification on the classification of bishops and the capacities in which bishops serve (including, in the Supplementary Materials, a chart showing types and titles of bishops); reducing the period for the Bishops and Standing Committees of the dioceses to approve the election of a Bishop from one hundred and twenty (120) days to sixty (60) days; clarifications of “vacancy in the episcopate” and of “Assistant Bishops;” and a number of proposed amendments to the Constitution and Canons.

## **B. Origins of the Task Force**

The Task Force was established under Resolution D004, adopted by the 2015 General Convention. The Task Force should be understood in the context of a continuum of discernment and dialogue about how the Church understands its needs and preferences for its leadership, including the episcopate, and for governing itself through the participation of all orders of ministry. Resolution D004, in part, was a response to Resolution 2015-A002, one of the Resolutions proposed to the 2015 General Convention by the Task Force for Reimagining The Episcopal Church [TREC]. Two pertinent resolved clauses from the 2015 Resolution proposed by TREC (Resolution 2015-A002) read as follows:

*Resolved*, That a task force on the episcopacy be appointed by the Presiding Officers composed of four bishops, four clergy, and four lay persons. The Task Force will explore the practice of and particular gifts, life experience, expertise, and social diversity required by the episcopacy, recommending to General Convention 2018 a new process for discernment, formation, search, and election of bishops in The Episcopal Church, and that \$100,000 be appropriated in the next triennial budget for this purpose; and be it further

*Resolved*, That within each bishop-search process, a mandatory time of discernment with the Standing Committees of the diocese in transition occur with the Standing Committees and bishops of adjoining dioceses.

## **C. Resolution 2015-D004**

In due course, the 2015 General Convention adopted Resolution D004 substantially the way it was introduced, which added detail to the ideas expressed in the two resolved clauses from TREC's 2015's proposed Resolution 2015-A002, set forth above. As adopted, Resolution 2015-D004 provided that:

*Resolved*, That a Task Force on the Episcopacy be appointed by the Presiding Officers composed of three bishops, three presbyters or deacons, and six lay persons; and be it further

*Resolved*, That at least one member of the Task Force will have been a finalist in an Episcopal search who did not receive enough votes for election in the last three years; at least one member of the Task Force will have served as a Transition Consultant in an Episcopal search over the past three years; and at least two members of the Task Force will have served on an Episcopal Search and/or Transition Committee in an Episcopal search process over the past three years; and be it further

*Resolved*, That the Task Force will study the election, appointment, roles, and responsibilities of the Episcopate, including the use of Bishops Diocesan, Bishops Coadjutor, Bishops Suffragan, Provisional Bishops, Missionary Bishops, and Assistant



Bishops in this Church; looking specifically at the particular gifts, life experience, and expertise required for episcopal office; and be it further

*Resolved*, That the Task Force will pay particular attention to the recent trend away from a diverse House of Bishops, and seek ways to encourage diversity in the Episcopate; and be it further

*Resolved*, That the Task Force will propose to the 79th General Convention a new process for discernment, nomination, formation, search, election, and transition of bishops in The Episcopal Church including, but not limited to: the roles and responsibilities of the Office of Pastoral Development; the selection of, roles and responsibilities of Transition Consultants; how adjoining dioceses may aid and inform the discernment of a diocese in transition; and any required Constitutional and Canonical changes necessary; and be it further

*Resolved*, That the Task Force will work with the Office of Pastoral Development to develop best practices and educational materials to be published electronically and made publicly available, and may use some of its budget to retain consultants who will help with this task; 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 \$150,000 for the implementation of this resolution.

Note: Notwithstanding the final clause of the Resolution, under the realities of the budget adoption process, no separate appropriation was made for the Task Force; limited funding for it was included in the budget line item for all interim bodies.

It was in this historical-legislative context that the Task Force first met in Linthicum, Maryland in December 2015 to organize itself and begin its work. The Task Force met in person again in November 2016 (Chicago), and in February and July 2017 (Linthicum). In addition, the Task Force met via video or telephone conference call nineteen (19) times. The Minutes of the Task Force's meetings are available at the Task Force's page on the website of The Episcopal Church.

## **II. THE ROLES AND RESPONSIBILITIES OF BISHOPS**

### **A. Missiology**

By simply reading the functional title *the Protestant Episcopal Church of the United States of America* one understands immediately the significance of the Order of Bishops to the identity of The Episcopal Church. From its inception the Church has affirmed the central role of bishops in its theology,

leadership and function. Fundamentally, the purpose and function of a bishop is set forth in the Rite for the Ordination of a Bishop starting at page 512 in the *Book of Common Prayer*.

First, the liturgy affirms that the people of the Church choose bishops, and that this affirmation is a holy trust. Then it describes the primary missiological work included in this sacred trust. A bishop “is 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 lords and King of kings.” *Ibid* at p. 517.

Following the foundational purpose of proclaiming and testifying to Christ, the bishop is “to guard the faith, unity, and discipline of the Church; to celebrate and to provide for the administration of the sacraments of the New Covenant; to ordain priests and deacons and to join in ordaining bishops; and to be in all things a faithful pastor and wholesome example for the entire flock of Christ.” *Id.*

Finally, the liturgy reminds bishops that their role is to step into the long heritage of others who came before and that the joy of the office comes not from the power and authority imbued at ordination, but by following, “him who came, not to be served, but to serve, and to give his life a ransom for many.” *Id.*

The liturgy makes clear the primary missiological role of a bishop: to participate in and provide for the proclamation and testimony of Christ’s resurrection and Christ as “Lord of lords and King of kings.” It then describes five tasks as the heart of this work: to guard the faith, to provide for the sacramental life of the Church, to ordain, to be a pastor and to exemplify the Christian life.

While the liturgy clearly sets out the primary work of a bishop, it provides little guidance about the practical and functional ways these things are to be accomplished. This leaves the discernment of application to each generation in the Church. In order to accomplish the tasks described in the *Book of Common Prayer* in the early 21<sup>st</sup> century, a bishop must possess strong leadership skills and ability to work with diverse people and opinions. The bishop is required to either possess or make provisions for effective communication, organization, motivation, strategic thinking and dealing with conflict. A bishop must possess a strong sense of her or his own personal identity grounded in the life, death and resurrection of Christ and clarity about her/his own strengths and weaknesses for the work.

The Prayer Book is also necessarily short on specifics about how the primary missiological work of the episcopate is lived out, allowing each generation to adjust to the changing realities of the world around it. In the current context, some observations about possible specific application are appropriate.

It is vitally important that a bishop have both personal and theological clarity about the unique role that Jesus Christ plays in God’s redemptive work. As one called to guard the faith, a bishop is called to express that clarity while at the same time being humble and receptive to other experiences and expressions of God’s presence in the world.

It is important that a bishop have a vibrant and vigorous approach to discipleship, leadership identification and development, and clarity about how the sacraments are to be administered in a rapidly changing environment. Identifying people for leadership, both lay and ordained, who reflect the diversity of the culture of a diocese, is also a high priority. It is crucial that a bishop think practically and theologically about how to administer the sacramental life when the Church is exercising ministry in an environment that is becoming increasingly secular.

It is a foundational responsibility of a bishop to be a pastor to those in the Church, as well as to those outside the immediate reach of the faith. It is also important that a bishop focus on developing other leaders, lay and ordained, to share in this sacred trust. In a rapidly shifting context like the 21<sup>st</sup> century, a bishop must pay particular attention to the pastoral care of those entrusted with leadership responsibilities in the Church.

Finally, as a bishop has always been expected to exemplify the Christian life in engaging family, friends and the community, it remains central to the work for a bishop to be honest about his or her own faith. A bishop will constantly strive to apply the core principles of the Christian faith to every aspect of life.

***Bishop as Chief Missionary***

The primary missiological role of the bishop “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 lords and King of kings” (*Book of Common Prayer*, p. 517) has a rich and important history in The Episcopal Church. In 1835 the General Convention, the same convention that affirmed that membership in the Domestic and Foreign Missionary Society was based upon baptism and not voluntary financial subscriptions, articulated a new understanding of the episcopate. General Convention stated that if the Church is first and foremost a missionary society, and if every baptized person is called to a life of mission, then the bishop is to be the chief missionary. The role of the bishop is to lead the Church forward in God's mission, to go ahead of the people to extend God's healing love in a broken and hurting world, and to motivate the faithful to full participation in God's mission.

Emphasizing the missiological nature of *episcopé*, the General Convention of 1835 created the missionary episcopate. The General Convention stated that any new work of the Church, be it in an overseas mission field or on the Western frontier of the United States, be initiated with the leadership of a missionary bishop. And so, the 1835 General Convention elected the first two missionary bishops of The Episcopal Church, Jackson Kemper for the Northwest and Francis Lister Hawks for the Southwest. In 1844, William J. Boone was elected the first foreign missionary bishop for the see known as Amoy and Other Parts of China. The revolutionary idea of the bishop as first and foremost the chief missionary has been perhaps the single greatest contribution of The Episcopal Church to the development of the modern Anglican Communion. See Robert S. Boshier, “The American Church and the Formation of the Anglican Communion, 1823-1853” The M. Dwight Johnson Memorial Lecture in Church History, 1962 (Evanston, IL: Seabury-Western Theological Seminary, 1962).

George Washington Doane, Bishop of New Jersey and the prime mover behind the changes in mission theology of the 1835 General Convention, said it best when he preached the sermon at the consecration of Jackson Kemper as the first missionary bishop. Doane said:

In strictness, as every minister of Jesus is a *Missionary*, so are the Bishops, as His chief ministers, *eminently Missionaries - sent out by Christ Himself to preach the Gospel - sent to preach it in a wider field - sent to preach it under a higher responsibility - sent to preach it at greater hazards of self-denial and self-sacrifice, and under the circumstances more appalling of arduous labor and of anxious care, - to fulfill, in a single word, that humbling, but most wholesome precept of the Savior, 'whosoever of you shall be the chiefest (sic), let him be the servant of all.'* (Italics in original.)

George Washington Doane, “Sermon at the Consecration of Jackson Kemper,” September 25, 1835, in Don S. Armentrout and Robert Boak Slocum, ed., *Documents of Witness: A History of the Episcopal Church, 1782-1985*, (New York: Church Hymnal Corporation, 1994), 108-109.

Just as the “mission fields” of the 19<sup>th</sup> century differed greatly from the plains of the upper Midwest of the United States to the towns and villages of rural China, the contexts in which Christians of the Anglican/Episcopal way are called to participate in God’s mission also vary greatly. The Episcopal Church is comprised of a vast array of dioceses with different needs, hopes, and aspirations. The 108 dioceses of The Episcopal Church (plus the Navaholand Area Mission, the Episcopal Church in Micronesia and the Convocation of Episcopal Churches in Europe) participate in God’s mission in a multiplicity of contexts from New England, where in a recent Gallup poll all six states were listed in the top ten most irreligious states in the United States, to the southwest of the United States where the country’s population is growing through both migration to the “sunbelt” from the northern part of the United States and immigration from Latin America; from countries in the Caribbean and Latin America, where poverty, violence, and political instability threaten daily life, to an increasingly secularized Western Europe wrestling with refugee migration and the insecurities of the European Union. <http://news.gallup.com/poll/203747/mississippi-retains-standing-religious-state.aspx>.

Given the great diversity of cultural, political, social and economic realities of the dioceses of The Episcopal Church it is neither possible nor appropriate to prescribe how a bishop is to be the chief missionary in her/his missiological context.

While The Episcopal Church has jurisdictions and dioceses in Europe, the Caribbean, Latin America and Asia, the majority of its membership of the Church (approximately 92%) still remains in the United States. And the religious environment of the United States is experiencing profound change as the country becomes increasingly less religious generally, and increasingly less Christian more specifically. The Gallup research organization has been tracking American religious beliefs since 2008 and its findings continue to show a decline each year in religious participation in the United States.

While the majority of Americans continue to identify as religious, over the last nine years those who identify as “nones” (having no formal religious identity) have increased by six (6) percentage points while Christians have decreased by six percentage points. In 2015, for the first time ever, the number of “nones” in the United States (56 million) surpassed the number of American Roman Catholics, with the latter having dropped to 51 million. Pew Research: “America’s Changing Religious Landscape,” May 12, 2015. Gallup stresses that the most significant trend in American religiosity is the growing shift away from formal or organized religion. In the 1940’s and 1950’s 97-98% of Americans identified with a formal religious body, the vast majority being Christian churches. This percentage dropped to the upper 60% range in the 1980’s and has continued to decrease to 56% in 2016. Gallup: “Five Key Findings on Religion in the United States,” 2016. While these demographic changes are not the only explanation of the loss in membership of our Church, mainline Protestant churches have experienced the decline in American Christianity over the last half century more acutely than other Christian churches in the United States.

The changing face of Christianity in the United States and around the world, as the Church declines in the industrialized West and grows in Africa, Asia, Latin America and the Pacific, is well-researched and well-documented by missiologists (scholars of the history, theology and practice of Christian mission). Responding to these changes, missiologists in North America are calling the churches in the United States and Canada to accept and engage the “missional” realities of America where the church is becoming increasingly more peripheral to the cultural, political, social and economic realities and structures of the United States. This movement is sometimes described as a transition from Christendom where the church was safe and secure in its power, place, and privilege to a new “post-Christendom.” Randy Ferebee in his book: *Cultivating the Missional Church: New Soil for Growing Vestries and Leaders* (New York: Church Publishing, 2012), at p. 38, says that the transition to post-Christendom is marked by a shift for Christians “from the center to the margins, from majority to minority, from settlers to sojourners, from privilege to plurality, from control to witness, from maintenance to mission, and from institution to movement.” Or as Presiding Bishop Michael Curry would remind us, we need to move from being primarily about the church as an institution to joining the “loving, liberating, life giving Jesus Movement.”

Whether or not one accepts the description of increasingly post-Christendom United States, the changes described here are the missiological context in which the bishop is called to be the “chief missionary” leading the faithful deeper into God’s mission “to restore all people to unity with God and each other in Christ.” *Book of Common Prayer*, p. 855.

## **B. Types and Titles of Bishops, Now and in the Future.**

Section VI of this report presents an exposition of the current titles and types of bishops, and proposes changes to these titles and types. See the Supplementary Materials for a chart summarizing the types and titles of bishops if the amendments to the Constitution and Canons set forth in Section VI are adopted.

**C. Gifts Needed for the 21st Century.**

What gifts do bishops need to be effective leaders in the 21<sup>st</sup> Century? The core gifts needed to be a faithful bishop are described in the ordination rite in the *Book of Common Prayer*. However, for a bishop to succeed in the 21st Century we turn to current thinking about what makes leaders effective. Multiple studies on effective leadership in the secular world offer some guidance, although with the caveat that the work of a bishop includes pastoral and spiritual responsibilities that most secular leaders do not have. These studies suggest, however, that it is increasingly important for bishops to understand the need for collaborative distributed leadership: bishops need to be leaders who can create an inspiring vision for building, growing, and evangelizing, and then empower laity and clergy to do the things that they are best at to make those visions reality. And having done that, they need to be able to get out of the way.

Jesus teaches us to focus on relationships, with God and with one another. Successful bishops deal in relationships, not transactions. Asking questions and listening to the answers builds relationships. Developing resiliency and flexibility to hear, absorb, and evaluate feedback as bishops navigate relationally, will enable them better deal with the inevitable challenges that will arise.

Communication is at the heart of everything a bishop does. More than most leaders, bishops are their messages. But if their message is hard to find, or delivered via an outdated medium, it will severely limit the message's effectiveness. An effective bishop will have a clear understanding of the communication tools at hand, from blogs to social media, and use them effectively and appropriately in ministry. Bishops who are not comfortable with these things should make sure they have staff who are and empower that staff to do the necessary work.

The terms "digital native" and "digital immigrant" are terms coined in 2001 by motivational speaker Marc Prensky as metaphors for how different people deal with the digital world. Natives are people who are totally aware of, make use of, and understand technology. And while natives tend to be younger people, that's not always the case.

Many people who grew up before the age of the Internet – digital immigrants - use technology with the ease of a native. Having said that, younger bishops tend to be more comfortable with the use of technology. However, the people electing bishops generally are older folks who may or may not be digital immigrants. This means it is essential that they, too, understand the importance of bishops for the 21<sup>st</sup> Century being comfortable with technology and the ways it can serve their ministry as bishops.

**D. Discernment/Recruitment.**

From our baptisms, God calls upon all of us to discover how we may be particularly gifted and guided to seek and serve Christ. For some of us, this seeking may be imbued with a sense of call to an ordained life in the church. The Episcopal Church takes discernment to Holy Orders seriously, and the way the Church has discerned God's will as it pertains to Holy Orders has varied widely throughout the years. Today, most dioceses have a formal process with a lengthy application and interview protocol and

require involvement with a Commission on Ministry, as well as the local bishop and Standing Committee. This process at its best is thoughtful, prayerful, honest, candid, thorough and, importantly - confidential. The aspirant is understood to be vulnerable, and care is taken with that person spiritually and, when applicable, professionally.

Discernment of a call to the orders of deacon and priest precedes discernment to a particular order or setting for ministry. Discerning a call to the episcopate, however, is handled very differently. At present, there is no formal process in place for a person to test an initial sense of call to the episcopate that is like the work often done in discerning the diaconate or the priesthood. Instead, one enters into discussion with a prospective diocese and is expected to discern both a call to the order of bishops and a call to the specific context and location simultaneously and publicly. If the Church expects candidates to clearly articulate why they feel God is calling them to the diaconate or the priesthood, and provides the opportunities and support for clarification, why the absence of such discernment guidance for the episcopate?

There seems to be an attitude in the Church that one must be invited, even cajoled into allowing one's name to be considered for bishop. Openly articulating a call to the episcopate is frowned upon, and often pejoratively described as displaying 'ambition'. We believe this negative reaction is also why people are reluctant to ask questions about their own vocation except in a limited fashion. We propose a mechanism to change that perception, so that exploring a call to any form of service to the Church may be seen as the faithfulness it is.

We note there is some wonderful work being done in support of episcopal discernment by individual and private groups, but these groups, conferences and programs are primarily occasional, size-limited, privately funded, and follow a cohort rather than an individual approach. We affirm the necessary and valuable work being done for many in these gatherings; what we are proposing is different and intended to be complementary.

We propose establishing a Church wide, voluntary, non-evaluative, and confidential process through which an individual may find resources, a safe space within which to ask questions, and support in discerning a possible call to the episcopate before they enter dialogue with a particular diocese. What we envision is a process where the result is clarity for the seeker, not a conclusion as to whether this individual ought to put themselves forward. This discernment is not pre-vetting. It is a pastoral response to an individual who seeks a safe place to wonder about a specific call and his or her own vocation.

We envision two (2) core components of this process:

1. Website that provides resources demystifying the episcopacy. This could include discernment resources, information about the episcopacy (such as canonical requirements), and testimonials from sitting and retired bishops about their experiences.

2. Person-to-person conversation, companionship, and mentoring. Companions or mentors could include sitting bishops, prior candidates in episcopal elections, or others. While acknowledging there are always contextual nuances, we believe there is enough common experience and expectation of the role of bishop to be valuable to people as they wonder about their call.

These two (2) components are intended to permit a person to honestly explore questions of this particular call. The result of the experience and what to do with the information is solely up to the individual.

The pilot Board for Episcopal Transitions, if established as proposed in Section IV.C.3 of this report, would be responsible for implementing these two components; if not established (and assuming that the General Convention does not take action specifically opposing these components), the implementation would be done by the Executive Council. The pilot Board or Council may choose to collaborate with and make use of the expertise of the OPD and other existing entities inside and outside the Church.

### III. DIVERSITY

#### A. Current Demography

It is difficult to obtain statistics on race, ethnicity, sexual orientation and other demographic categories in the House of Bishops because there is very little official demographic data maintained with respect to bishops. Using information from a variety of sources, the Task Force collected what it believes to be accurate data on bishops in dioceses within the United States.

Bishops in dioceses in the United States are overwhelmingly male and overwhelmingly white. As of December 2017, of the ninety-eight (98) United States dioceses plus Navajoland, which is an Area Mission, there were seven (7) dioceses without a Bishop Diocesan. Of the ninety-two (92) United States dioceses with a Bishop Diocesan, eighty-six (86) (93.5 percent) of the bishops were men. Of the eighty-six (86) male Bishops Diocesan, seventy-eight (78) (91 percent) were white men and eight (8) (9 percent) were of color. Thus, of the ninety-two (92) Bishops Diocesan, seventy-eight (78) (85 percent) were white men. Six (6) (6.5 percent) of the Bishops Diocesan were women; five (5) of the women were white and one (1) was African American. Of the total Bishops Diocesan, eighty-three (83) (90 percent) were white.

As of December 2017, all seven of the Bishops serving in an interim or provisional capacity in a United States diocese without a Bishop Diocesan were white: five (5) male and two (2) female. In the ten (10) non-United States dioceses plus The Convocation of Episcopal Churches in Europe, all of the Bishops were men. Of the nine (9) persons serving as Bishops Suffragan, seven (7) were women (six white and one African American) and two (2) men (one white and one Asian American).



Women comprise 6.5 percent of active U.S. Bishops Diocesan, compared to fifty-five (55) percent of self-identified Episcopalians, thirty-four (34) percent of active clergy, and forty-eight (48) percent of the House of Deputies (Church Pension Group Office of Research 2012; House of Deputies of the Episcopal Church 2015; Pew Research Center 2017). The vast majority of U.S. bishops are also white: 90 percent of active Bishops Diocesan are white, compared to ninety (90) percent of self-identified U.S. Episcopalians and seventy-seven (77) percent of the House of Deputies (House of Deputies of the Episcopal Church 2015; Pew Research Center 2017). These statistics show that people of color are underrepresented in the episcopate in absolute terms and women are underrepresented in both absolute and proportionate terms in the dioceses within the United States.

### **B. Reasons for Diversity**

We are all created in the image of God, blessed by God and declared “very good” by God. (Genesis 1:27-31) As St. Paul wrote in his letter to the Galatians “There is no longer Jew or Greek, there is no longer slave or free, there is no longer male and female; for all of you are one in Christ Jesus.” (Galatians 3:28) God did not create privileged classes or second-class citizens. Failing to seek greater diversity in the Church, including the episcopate, is to deny the gift of the diversity of humanity that God created. We seek a more diverse episcopate because it reflects the Kingdom of God.

Efforts to increase the representation of women and racial and ethnic minorities among bishops are often framed as efforts to increase diversity. Diverse groups bring varied perspectives and interpretations to situations. Thus, increasing the number of bishops who are women or members of racial and ethnic minorities can increase diversity and contribute to the collective functioning of The Episcopal Church. Thus, we seek a more diverse episcopate because it is collectively beneficial.

In a more diverse episcopate, more people can see someone like themselves represented in the Church’s significant leadership roles. The composition of bishops is one way we signal to Episcopalians and the broader community who is welcome in our faith community and whose voices are heard and elevated. Thus, we seek a more diverse episcopate because it is inclusive.

Current levels of representation of women and minorities among bishops reflect in part institutionalized racism, sexism, and other systems of privilege and exclusion that affect the Church and all social institutions. Hiring discrimination by sex, race, sexual orientation, and parental status (whether someone is a parent or childless) is socially prevalent (Pager and Shepherd 2008; Goldin and Rouse 2000; Tilcsik 2011; Correll, Benard, and Paik 2007; Neumark, Bank, and Van Nort 1996). Thus, we seek a more diverse episcopate because we believe it is just.

### **C. Fostering a Diverse Episcopate**

Fostering a diverse episcopate will require effort at both the Church wide and diocesan level. This section proposes recommendations at both levels, which are intended to be illustrative rather than exhaustive. We recognize that search and hire processes can disadvantage some applicants because of their race, gender, or other identities, even in the absence of any malicious or discriminatory intent. We

all have unconscious biases – so-called “blind spots” (Banaji and Greenwald 2013). Because these biases are so hard for us to see, it is dangerous to rely on our own good intentions to eliminate them. Furthermore, despite the popularity of interventions such as diversity trainings, their effectiveness in bias reduction is unknown and may in some cases cause backlash, reducing rather than increasing diversity (Dobbin and Kalev 2016; Paluck and Green 2009). In light of these challenges in erasing individual biases, we encourage implementing policies and practices that can ameliorate their negative consequences (see Bohnet 2016).

Lack of appropriate data undermines current efforts to diversify the episcopate. Because the Church does not currently maintain records of the demographic characteristics of elected bishops or of the applicants and finalists in episcopal elections, it is challenging to identify search, discernment, and election processes that support or undermine diversity. The 2012 General Convention adopted Resolution A144, which requested that the Office of Pastoral Development work with other offices to (a) monitor the representation of women and other underrepresented groups in episcopal elections, (b) perform data analysis that could inform recommendations for steps to improve this representation, and (c) advise dioceses as to how episcopal transition processes may be affected by bias and work with dioceses to reduce bias (Journal of the 77th General Convention of The Episcopal Church 2012). The task force appointed in response to this resolution wrote in 2015: “The Task Force is concerned that without further data-gathering and analysis to help discover the ‘why’ behind the monitored data patterns, that... the monitored data alone offers no information that could enhance the ability to make corrective recommendations” (Report of the House of Bishops Committee on Pastoral Development, “Reports to the 78th General Convention” 2015, p. 59). In particular, the task force cited as a limitation that the bishop election process requires no demographic reporting. A primary recommendation of this Task Force is that the Church enhance data collection, including requiring dioceses holding episcopal elections to report demographic characteristics of the applicant pool, finalists, and elected bishop. These data will allow more empirically grounded, evidence-based recommendations for enhancing the diversity of the episcopate in future years.

One of the important issues that needs to be addressed is how dioceses and the Church can better invest in the career development of women and racial/ethnic minority clergy. The Task Force did not have the time or resources to explore this issue adequately. Therefore, the Task Force recommends that an Interim Body, whether a Standing Commission, Task Force to be created or other group, explore how dioceses and the Church can better invest in the career development of women and racial/ethnic minority clergy and report their findings and recommendations to the 80th General Convention.

In the following subsections, we discuss possible steps toward greater diversity in the episcopate. In addition to providing recommendations for dioceses during their search for a bishop, we suggest ways that both the Church and its dioceses not actively seeking a bishop can support diversification.

1. Recommendations for dioceses searching for a Bishop Diocesan

- Once the Bishop Diocesan has issued the call for the election of a successor, primary responsibility for emphasis on diversity falls to the Standing Committee of the electing diocese. Diversity must be an important consideration in the selection of the members of the search and transition committees. Consider factors such as gender, race/ethnicity, age, region, and experience in the diocese (both duration and kind).
- Generating a diverse slate of candidates begins with crafting the profile and recruitment processes. Before the profile is released, discuss methods for actively recruiting a diverse candidate pool. This may include publicizing the announcement in diverse outlets and actively encouraging women and members of racial and ethnic minorities to apply. The Standing Committee should communicate periodically with the diocese’s search committee to reinforce the importance of supporting diversity throughout the entire process.
- Implicit biases can manifest by selectively highlighting the strengths (or weaknesses) of one candidate, while overlooking the same traits for another. Biases may also lead us to prefer candidates who are similar to ourselves on characteristics irrelevant to job performance, such as hometown or leisure activities (Rivera 2012). Establish on what dimensions candidates will be evaluated before looking at any applications and discuss how to weight different dimensions. Agreeing to a set of criteria in advance makes it harder for implicit bias to “seep through,” as the group can refer back to the agreed-upon desired characteristics.
- “Blind” evaluations offer one way to reduce unconscious bias (Goldin and Rouse 2000). Consider screening candidates’ written materials with information about location, race/ethnicity, gender, sexual orientation, age, and family status redacted. The Task Force understands that this is being done in a number of recent searches.
- Avoid requesting or otherwise soliciting information about marital/partnership and parenthood status. Search committees may be tempted to consider this information part of determining whether a candidate “has what it takes” to thrive in a demanding job, but information of this kind can disadvantage some candidates, particularly mothers (Correll, Benard, and Paik 2007).
- Women and racial and ethnic minorities are often represented among finalists in episcopal elections in similar proportion to their representation among applicants, but nonetheless underrepresented among elected candidates (Report of the House of Bishops Committee on Pastoral Development, “Reports to the 78th General Convention” (2015), Appendix: Report on 2013-14 Episcopal Elections – Resolution A144 (2012) Task Force on Women and Other Underrepresented Groups, pp. 59-63). This may reflect practices and beliefs of both electorates and search committees. On the electorate side, we recommend providing congregations with best practices in identifying and training representatives to the electing diocesan convention. These practices may include, among others: (1) demystifying the role to encourage a broader range of parishioners to consider serving; (2) providing potential representatives information about what will be expected of them, including attendance at walkabouts; (3) actively encouraging women, people of color, and members of other underrepresented groups to consider serving. On the search committee side, when women or racial/ethnic minority finalists are included only as “tokens” to fill out the slate (e.g., as a single alternative in a large pool, or late in the

process), these candidates are unlikely to be elected. Search committees must be diligent throughout the process in encouraging the application of a diverse array of qualified candidates. Dioceses should give careful consideration to investing in the career development of women and racial/ethnic minority clergy and implementing any recommendations that may result from the study of an interim body as discussed in the previous section of this report.

- Dual-career couples, some but not all of whom are dual-call, are common in the Church. Consider providing and publicizing resources to support these couples, such as job-search support for the non-hire partner. Dual-career assistance may be particularly important in encouraging applications from women in different-sex partnerships who do not already reside in the diocese, as geographic moves by couples tend to privilege the male partner’s career (Bielby and Bielby 1992; Sorenson and Dahl 2016).
- Report to the Church the demographic characteristics of applicants, finalists, and the elected bishop.
- The Diocese of Indianapolis implemented a process consistent with several of these suggestions in its 2015-2016 search for a Bishop Diocesan. See <http://hoosierbishopxi.org/index.php/slate/process-timeline>. The first African American female Bishop Diocesan in the Church was elected from this process.

2. Recommendations for dioceses not currently searching for a bishop

- Social accountability –having to explain how we came to the outcomes we did – tends to increase diversity (Dobbin and Kalev 2016). Collect and make publicly available aggregated (not individually identifiable) statistics about the characteristics of individuals who apply to and are selected for bishop and clergy positions, as well as characteristics of currently-serving deacons, priests and bishops. Evaluate whether women and members of racial and ethnic minorities tend to be placed in positions with similar pay, responsibility, and opportunities for advancement as their male and white peers. Regularly publish trends in these statistics over time. Appointing diversity managers or diversity task forces can help ensure accountability.
- Evaluate diocesan policies and processes that may unintentionally foster structural barriers to diversity. Failure to adopt policies such as Safeguarding God’s People may send a message that a diocese will not take action when harassment is reported. Failure to provide proper implementation and training may reinforce pre-existing attitudes, such as that those who report harassment are “trouble makers” or that the perpetrators are “just making harmless jokes” (Dougherty and Goldstein Hode 2016).
- Search committees may look for candidates’ experience leading large congregations. Women clergy face barriers to accumulating this experience. Newly ordained female clergy are less likely than their male counterparts to be employed as solo rectors (Church Pension Group Office of Research 2012). Among clergy serving as solo or head priest, women are underrepresented in larger parishes (Nesbitt 2015). Female clergy also

experience smaller earnings gains when they change positions (Church Pension Group Office of Research 2012), and they have lower median compensation than their male peers with similar experience (Price, Hurst, and Munyua 2017). Similar concerns may apply to clergy who are racial/ethnic minorities, although, to the best of our knowledge, no data are available on this point.

- Distribute to parishes in transition a set of best practices for encouraging a diverse search, modeled after the guidelines described above for dioceses searching for a bishop.
- Enlist men and white people as allies in the work of identifying and supporting talented women and people of color. In addition to recruitment efforts, mentoring programs offer a way to engage those in more privileged positions in the work of developing individuals at earlier career stages. Mentoring programs need not be limited to connecting individuals with similar characteristics; they can also connect individuals to mentors to whom they might not otherwise have access. Targeted recruitment programs and mentoring programs are both associated with increased organizational diversity (Dobbin and Kalev 2016).
- The policies and procedures governing the election itself, such as who votes and the vote thresholds for election, may affect the diversity of elected bishops. Dioceses not currently engaged in an election process may benefit from reviewing these policies with an eye to possible diversity implications.
- As more data are collected, evidence on policies and practices that facilitate diversity will improve. Practices that work well in one diocese may not translate to another. The Church can support dioceses by gathering and analyzing data to establish best practices and disseminate them to dioceses. Thus, diocesan policies should not be viewed as static, but will need to evolve in response to the diocese’s own experiences and emerging Church wide evidence.

### 3. Church wide recommendations

- Invest in training Transition Consultants on practices that improve diversity, so that they can act as in-house experts on these matters for diocesan search committees.
- Provide financial resources to dioceses to support dual-call or other dual-career couples.
- Among other options, one form of mentoring program might allow those discerning a call to the episcopacy to explore this call in advance of entering a specific search (see Section II.D of this report).

Consistent with this discussion and the recommendations included therein, the Task Force recommends adoption of the following Resolutions.

**Resolution A138: Transmission of Demographic Data from Episcopal Elections**

*Resolved*, the House of \_\_\_\_\_ concurring, That within sixty (60) days after the election of a Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan or Assistant Bishop, or the appointment of a Bishop Provisional, the electing or appointing Diocese shall transmit to the pilot Board for Episcopal Transitions, for each nominee to the electing convention or person considered for the Bishop Provisional office, the name, age, race and ethnicity, gender, number of years since ordination, diocese of canonical residence and such other demographic data or other information as the Board may reasonably request, as well as, when there was an election, a brief description of the voting procedures (such as requiring a supermajority of votes, dropping off candidates receiving votes below a certain threshold, or other similar procedures) and the results of each round of voting.

**Explanation:**

As articulated in the Task Force’s report, progress towards the Church’s goals and aspirations in the diversity of its leadership, including bishops, is dependent to a significant extent on gathering critical data to inform plans to achieve those goals and be faithful to those aspirations. The specified data should be simple and easy for an electing diocese to gather and send to the pilot Board for Episcopal Transitions.

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**Resolution A139: Analysis of Data from Episcopal Elections**

*Resolved*, the House of \_\_\_\_\_ concurring, That the pilot Board for Episcopal Transitions engage one or more experts in data analysis to analyze the demographic and other data received from the electing dioceses, and when a sufficient number of electing dioceses have reported, but at least triennially, report the results of the analysis, in such form as the Board shall deem appropriate, to the Executive Council and triennially to the General Convention, the reports to be made public promptly after review by the Executive Council.

**Explanation:**

The collected data will be far more useful to the Church with the benefit of professional data analysis. The resulting annual reports should be made available church-wide.

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**Resolution A140: Diversity Guidelines for Episcopal Elections**

*Resolved*, the House of \_\_\_\_\_ concurring, That Section III (Diversity) of the Blue Book Report of the Task Force on the Episcopacy be provided to dioceses at the beginning of their search process along with such other information with respect to diversity as the pilot Board for Episcopal Transitions may deem appropriate, all such information to be updated at least triennially by that Board.

Explanation:

The Church should develop and distribute to electing dioceses a set of policies for best practices in fostering diversity in a search. The diversity section from the Task Force's Blue Book report is a sensible place to start this ongoing effort. As a best practice that section would be updated at least triennially as the Church learns more about what does and does not work.

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**Resolution A141: Training of Transition Consultants**

*Resolved*, the House of \_\_\_\_\_ concurring, That electing dioceses are urged to engage Transition Consultants who have been thoroughly trained in programs developed or recommended by the pilot Board for Episcopal Transitions, including training in practices that have been demonstrated to improve diversity.

Explanation:

The pilot Board for Episcopal Transition's development of best practices for achieving leadership diversity goals and aspirations might achieve little progress unless the Transition Consultants used by dioceses are themselves well-versed in those best practices. It needs to be clear that this training is of an entirely different order than typical diversity training programs.

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**Resolution A142: Adoption of Episcopal Election Procedures by Dioceses**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 79th General Convention recommends that each diocese adopt policies and procedures and, where appropriate, canons, for the election of bishops that are consistent with the principles and values presented in the Task Force's Blue Book report, to foster diversity across the Church's leadership, including its bishops; and be it further

*Resolved*, That the pilot Board for Episcopal Transitions develop and provide to the dioceses examples of policies, procedures and canons that are consistent with fostering diversity.

Explanation:

Consistent with this series of proposed Resolutions, achievement of significant progress towards the Church's leadership diversity goals and aspirations will be greatly enhanced if dioceses, prior to entering the transition and electing phase, first adopt election policies and procedures consistent with fostering diversity.

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**Resolution A143: Study Career Development of Female and Minority Clergy**

*Resolved*, the House of \_\_\_\_\_ concurring, That the issue of how dioceses and the Church can better invest in the career development of women and racial/ethnic minority clergy be assigned to an appropriate interim body for study and consideration, with an analysis and recommendations to be reported back to the 80th General Convention.

Explanation:

The study recommended in this Resolution will help the Church at all levels to discern how to achieve long-held but long unachieved diversity goals.

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**IV. SEARCH AND ELECTION PROCESSES**

**A. Missional Review**

Moving into the 21st Century the Church must confront the changing landscape occurring across the broad spectrum of our corporate life, both spiritually and culturally. Trying to peer into the future we should ask ourselves, not only as a denomination, but also as individual dioceses: Where are we going? What do we want to happen? How can we share the Good News of the Risen Lord in our time and place?

The impetus for an engaged, intentional and robust Missional Review finds its origins in Resolution 2015-A002 which says, in part, “that within each bishop-search process, a mandatory time of discernment with the Standing Committee of the diocese in transition occur with the Standing Committees and bishops of adjoining dioceses”. Potential collaboration between and among contiguous dioceses also has the potential to reduce operational costs and realize other benefits of partnership that could enhance the ability to do mission in all of them.

Dioceses are encouraging individual congregations to look for synergies and opportunities within a wider missional area as a matter of practice. Through the work of partnerships, shared ministry and regional teams, individual congregations whose resources to stand alone may be insufficient are finding new models for combination and collaboration and for being the Church in their mission field(s). The effectiveness or success of these efforts seem intuitively sensible and anecdotally show promise but, to the Task Force’s knowledge, have not been subject to close research and analysis.

What might a diocesan-level missional review look like? First, we see the possibility of using some innovative models for self-assessment that are already in practice, such as “asset-based” community development. Second, we see it guided closely by a missional review consultant; a consultant with guidance from a Church wide office or other body - perhaps the OPD or, if approved by the General Convention, the pilot Board for Episcopal Transitions described elsewhere in this report. The Task Force proposes a budget item for the upcoming triennium for grants to dioceses needing financial assistance in retaining a missional review consultant.



Some of the questions that might be asked in a missional review are:

- Is the diocesan infrastructure capable of permitting people to exercise their ministries in healthy and life-giving ways? Is the staffing sufficient? Does it have the capacity to use its resources and potentially the resources of other dioceses?
- Are the staff (including the bishop(s)) compensated appropriately and in a timely manner?
- Is the diocese capable of fulfilling its financial obligations, including those in its own budget and its assessment to be paid to The Episcopal Church?

Other questions are listed in the Resolution we propose just below. These questions are derived from an outline developed by the Diocese of New York in a 2016 report to its diocesan convention.

The missional review would, ideally, take place regularly but should be required prior to a diocese beginning the search process for a new Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, Assistant Bishop or Missionary Bishop - and could begin prior to the departure of the current Bishop Diocesan. Most if not all dioceses would likely benefit from periodic missional reviews in order to discern areas in which the diocese is healthy and areas in need of attention. If periodic reviews are done, when the time to elect a new bishop arrives, the diocese will already have “baseline” information in hand, for which an update can be done more quickly than a completely new review for a diocese that has not completed any reviews. The Task Force recommends that dioceses perform missional reviews on a regular, periodic basis, not only to create and maintain a baseline for updating the diocese’s missional profile when an episcopal election is on the horizon, but also to serve as a regular survey of the health of the diocese.

We believe that as we think of ways that congregations within a parish may collaborate to better use resources, and to serve and interact with more of the communities, we can open our imaginations to include this level of discernment and assessment among contiguous dioceses, as we seek a vision for the future.

Accordingly, the Task Force proposes the amendments to Canon III.11.1 discussed in Section VI.E and set forth in Section VI.H and the following Resolution to implement the missional review proposal.

**Resolution A144: Diocesan Missional Review**

*Resolved*, the House of \_\_\_\_\_ concurring, That the 79th General Convention finds it to be in the best interests of The Episcopal Church that all dioceses and other jurisdictions of the Church engage in the process of a missional review periodically but no less often than prior to engaging in an episcopal search process; and be it further

*Resolved*, That missional reviews include, but not be limited to, asking questions such as:

- Is the diocesan infrastructure capable of permitting people to exercise their ministries in healthy and life-giving ways? Is the staffing sufficient? Does it have the capacity to use its resources, and potentially, the resources of other dioceses?
- Are the staff (including the bishop(s)) compensated appropriately, according to local diocesan guidelines and the recommendations of General Convention including pension contributions and healthcare and in a timely manner?
- Is the diocese capable of fulfilling its financial obligations, including those in its own budget and its assessment to be paid to The Episcopal Church?
- Is the diocese capable of deploying and implementing programs for the congregations (i.e., safe church training, anti-racism training, stewardship programs, vestry training, festivals and meetings)?
- Are the diocesan properties safe, sound, and insured? Are there resources (financial or otherwise) available to assist congregations in crisis?
- Are there enough people to fill leadership roles to implement mission and vision?
- Is there enough spiritual health in the congregations?

; and be it further

*Resolved*, That dioceses participating in a missional review be urged to seek collaboration and a sharing of ideas and visions with surrounding dioceses; and be it further

*Resolved*, That the knowledge, insights, and wisdom gained by a missional review be used to help define the gifts and talents that a bishop might bring to the diocese.

Explanation:

It has become more commonplace for a clergy vacancy within local congregations of a diocese to prompt a time of discernment beyond that particular congregation. Dioceses are encouraging individual congregations to look for synergies and opportunities within a wider missional area as a matter of practice – and separately from the existence of a vacancy in the clergy leadership. Through the work of partnerships, shared ministry, and regional teams, individual congregations whose resources to stand alone may be insufficient have found and are finding new models for combination and collaboration and for being the Church in their mission field(s). A missional review process would prompt a diocese to engage in a comparable discernment and reflection process, regardless of an anticipated or existing episcopal vacancy.

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## **B. Diocesan Discernment; Central Role of the Electing Diocese**

After examining various ways bishops throughout the Anglican Communion are selected, we conclude that the selection of bishops should continue to be by election. Consistent with the polity of our Church and its Constitution (Art. II. Sec.1.), the electing diocese should continue to have the primary responsibility for the process. As the Task Force learned through its discussions, at times it is easy to discern when a proposal would change the polity of the church in this regard, and at other times it is not so easy or clear.

While the General Convention has the authority to prescribe rules that must be followed by individual electing dioceses, at this time we believe that it is appropriate for General Convention to do so in

limited ways and only where compelling cases can be made for canonical changes (as above, for a missional review process) to improve the election process throughout the Church. We believe it would be in the best interest of the Church if each diocese were to address the issues presented in the following Resolution in their local canons.

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**Resolution A145: Urging Adoption of Local Canons Relating to Episcopal Elections**

Resolved, The House of \_\_\_\_\_ concurring, That the 79th General Convention urges each diocese and jurisdiction of The Episcopal Church, prior to the call for the election of its next bishop, to adopt canons addressing the following subjects:

- An outline of the procedure to be followed by the diocese in its search and election process beginning with the initial call for an election and ending with the ordination of the new bishop;
- Identify specific actions to be taken to
- Encourage a diverse applicant pool and follow a search and election process that reduces the likelihood of discrimination on the basis of race, ethnicity, or gender;
- 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 the collection of pertinent data for all persons 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

Explanation:

Article II, Section 1 of the Constitution requires that the “Bishop or the Bishop Coadjutor shall be chosen agreeably pursuant to rules prescribed by the Convention” of that diocese. This is consistent with the polity of the Church. While it is important that the listed issues be addressed by each electing diocese or jurisdiction, the convention of each diocese has the right to define the actions needed to be taken to address these issues. It is in the interest of the Church, however, that each diocese act prior to the call for an election is made by the incumbent bishop, so this Resolution calls each diocese’s attention to the need for action and leaves to the electing diocese the ability of each individual diocese to act.

Section IV.C.4 of this report goes into additional detail on the need for background and medical screenings, and how we recommend dioceses handle and use the data obtained from those efforts.

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### C. Extra-Diocesan Support from The Episcopal Church

Central to the responsibilities of the Task Force was the charge to:

“... propose to the 79th General Convention a new process for discernment, nomination, formation, search, election, and transition of bishops in The Episcopal Church including, but not limited to: the roles and responsibilities of the Office of Pastoral Development; the selection of, roles and responsibilities of Transition Consultants; ...”

The Office of Pastoral Development’s [OPD] consultative assistance is widely but not universally used, and is optional for each electing diocese. Over the years, this assistance has been updated and expanded to meet the needs of electing dioceses, whether large or small, and generally without regard to a diocese’s financial ability to fund a search. Examples of some of the types of consultative assistance provided by the OPD are listed below, following a discussion of the origins and role of the OPD and the College for Bishops.

A Brief History of the Office for Pastoral Development and the College for Bishops.

To understand how diocesan election and transition processes have been done and may be improved, it is helpful to know something about the history of the OPD and its role in these processes.

The OPD grew from a House of Bishops committee founded in 1959 to study the pastoral needs of clergy and their families. By 1968, the OPD itself had emerged from this effort, led by a bishop appointed by the Presiding Bishop (the Bishop for Pastoral Development). By 1979, the OPD had expanded to include consultation with bishops planning to resign and dioceses undertaking episcopal searches and elections; developing a manual for use during episcopal searches, elections and transitions, and recruiting and training Transition Consultants. This growth responded to requests from dioceses seeking assistance and guidance in the search, election and transition processes.

In addition, the OPD has developed post-election programs and services that include ministry and pastoral care to bishops-elect and their families; a peer-consultation program where a new bishop is mentored by a seasoned bishop trained for this; continuing education seminars sponsored by the College for Bishops; consultations to support bishops encountering challenges and stresses, and encouragement to use performance evaluation as a means toward personal growth. As noted above, the OPD is led by a Bishop for Pastoral Development. In 1980, the OPD set up the “Bishop’s Academy” to house the formation and continuing education programs, and this evolved into what we now know as the College for Bishops, led by a Managing Director.

Canonical changes (Canon III.12.1 and III.12.2) were adopted by the 2006 General Convention to provide explicitly for the formation and continuing education of bishops. These Canons provided as follows:

CANON 12: Of the Life and Work of a Bishop

Sec. 1. Formation

Following election and continuing for three years following ordination, new Bishops shall pursue the process of formation authorized by the House of Bishops. This process of formation shall provide a mentor for each newly ordained Bishop.

Sec. 2. Continuing Education

The House of Bishops shall require and provide for the continuing education of Bishops and shall keep a record of such education.

While the 2006 General Convention adopted these canonical changes and their mandated three-year formation and continuing education requirements, owing to significant budgetary challenges in 2009 it did not appropriate all of the funding requested by the OPD for the 2010-2012 triennium. This led the House of Bishops, at its September 2010 meetings, to adopt a resolution to incorporate the College for Bishops based in large part on the belief that to do so would make it easier to raise donated funds to help the College deliver its programs. The House of Bishops then proceeded to incorporate the College for Bishops and formally establish its sole oversight and control of the College. This led to concerns that the vital function and purpose of the College – and of the OPD itself, were evolving and expanding without the direct participation of all orders of ministry (specifically, without the concurrence of the House of Deputies or some action by Executive Council). These concerns have been reflected in the Task Force’s own dialogue. The Task Force’s discernment on the matter led it to propose a pilot governance structure (the pilot Board for Episcopal Transitions) to enable the Church to explore and perfect a collaborative, engaged way of providing both OPD and the College with broad support and participation from all orders of ministry.

Note: A more detailed history of the OPD is available on its website, [www.episcopalchurch.org/pastoral-development](http://www.episcopalchurch.org/pastoral-development). More information on the College for Bishops is at <http://www.collegeforbishops.org/>.

The OPD Programs and Services

1. Best Practices and Other Materials
  - a. Manual

From the outset of its consultative assistance efforts, the OPD has relied upon data gathering, research, and experts to help develop the material for use at the diocesan level. Relying on a three-year, in-depth study of 11 diocesan searches along with on-site visits, interviews, and a study of data from the OPD and the Church Development Office, experienced consultants developed the first collection of best practices given to dioceses. The current document is *The Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition* (the “Manual”).

The Manual is a collection of different practices that have proven helpful in the conduct of the election process. This variety of practices gives electing dioceses flexibility to meet local demands of costs, customs, and improved search methods. This flexibility also makes the Manual useful for both large and small dioceses. Dioceses are not required to use the Manual, and, when used, its contents are only recommendations.

b. Manual Revision

Past Manual revisions have been based upon new data collected by surveys, recommendations from Transition Consultants, and data collected by the OPD from its long experience. The Task Force believes that the revision process needs to have a more formal structure and frequent cycle. It should include a team of individuals, lay people, priests, deacons and bishops experienced in the conduct of episcopal elections. The team should also include at least one Transition Consultant. Making revisions must not delay the availability of the Manual for use during on-going episcopal elections. The current Manual is sufficient for current use by electing dioceses although there is consensus that an update is in order.

The next revisions to the Manual should recommend or, as the case may be, continue the practice of providing the items set forth in the following Resolution:

**Resolution A146: Revisions to The Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition**

*Resolved*, That the 79th General Convention urges that the *The Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition* (the “Manual”) be revised and updated to reflect the following:

- Best practices for transition process from announcement of transition to incorporation of newly elected bishop into diocesan system
- Resources that provide flexibility for use by both large and small dioceses
- Alternatives to minimize costs of transition process
- Ways to establish a transparent transition process with accountability
- Training for elected diocesan leaders/committee members involved in the transition process
- Suggestions for use of technology including secure internal communications among diocesan committees, secure communications with potential nominees, and secure sharing of reference and background check information
- Means for electronic and other background checks
- Suggestions for use of social media and websites for communicating search profile, status update, and election information

- Expanded reference check resources
- Most current medical and psychological testing
- Expanded background check resources including legal, financial, criminal, vehicular and civil information
- Interviews with current and former bishops with oversight of potential nominees
- Interviews with current and former diocesan Transition Ministers in ministry with potential nominees
- Encourage election procedures that allow time for adequate screening (e.g., discourage nominations from the floor)
- Transition Consultant services
- Discussion of election options/alternatives available to dioceses per canons

Explanation:

Pursuant to its mandate the Task Force on the Episcopacy analyzed the current Manual and determined that the matters set forth in this Resolution would help improve the processes for electing bishops.

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c. Other Materials

The current digital, video and printed materials require updating along with an expansion of scope and type of materials with adaptation for electronic transmission. Special funding will be required for this and is proposed by the Task Force.

2. Transition Consultants

Transition Consultants are trained individuals experienced in the conduct of episcopal searches and elections and who are willing to devote time and energy to help diocesan committees in the conduct a search, election and transition process. If used by a diocese, they can be an important part of a smooth, effective episcopal election process. Although they can only make recommendations and cannot require the electing diocese to take any specific action, their participation in the election process can enhance the scope of the search for potential nominees, assist in efforts for diversity and transparency, organize the diocesan committees, and help keep them on schedule. Electing dioceses should be encouraged to use Transition Consultants and to retain one as early in the election process as possible.

The OPD should expand the existing organization of and support for Transition Consultants. Recruitment and training should be formalized and expanded, and adequate funding must be provided. Individual performance records, based upon data from electing dioceses and from other sources, should be collected and analyzed. A formal process should be created to allow each electing diocese to provide feedback to the OPD on the performance of the Transition Consultant that worked with that diocese. The contracts used and fees charged by Transition Consultants should be standardized and monitored by the OPD.

Transition Consultants are often sources of useful feedback to dioceses and the OPD (and will be to the proposed pilot Board) on the episcopal election process and the effectiveness of the OPD's consultative assistance; they should be involved in the routine evaluation of the OPD's support of electing dioceses.

Transition Consultants are addressed by the Task Force below, in a Resolution concerning the Task Force's proposal to establish a pilot Board for Episcopal Transitions.

### 3. Proposed Pilot Board for Episcopal Transitions

As mentioned above, the Task Force proposes a pilot for a new Church wide body to revise existing resources and develop new resources for episcopal search, election and transition processes. In this section of our report, we reiterate, briefly, the background of this proposal and the contours of the proposed pilot board.

Born out of an unmet need, the OPD began assisting dioceses with episcopal searches some 60 years ago. As the OPD provided assistance and advice to Bishops Diocesan, it came to also provide advice to diocesan Standing Committees. Eventually its responsibilities grew to assist with the episcopal election process and transition into office of newly elected bishops for whom the Bishop of the OPD had pastoral care and formation responsibilities.

There is, however, no canonical or polity reason why assisting a diocese with the episcopal search, election and transition process necessarily belongs in or should be administered out of the office of the Presiding Bishop. The search and election process for bishops is conducted solely by the lay and clergy of the electing diocese. There is no canonical role for bishops other than that the Bishop Diocesan may preside over the diocesan electing convention and a majority of bishops with jurisdiction must consent to the election as must a majority of Standing Committees. All orders of the Church have a vested interest in seeing that the search, election, transition and formation of bishops is conducted well, is effective and meets the changing needs of the Church.

While we commend the diligent and invaluable work of the bishops who have served in the OPD and created the system that currently exists as an optional resource to dioceses conducting episcopal searches, the 2015 General Convention in its charge to this Task Force (Resolution D004) directed us to take a fresh look at the entire process for discernment, nomination, formation, search, election, and transition of bishops – including the OPD. In the following pages, we offer a proposal to reimagine oversight of the OPD in a way that includes all orders.



The Task Force was unable to develop fully a new process for discernment, nomination, formation, search, election, and transition of bishops during this triennium. As discussed elsewhere in this report, it analyzed the current system and resources extensively and discussed ways the current system is working well, ways it is not, ways it can be improved, as well as the role of the OPD. The analysis and potential recommendations for changes were impacted by the 2017 retirement of the then Bishop of the OPD, development of a job description by the Presiding Bishop for the new Bishop of the OPD, and the search for and hiring of the new Bishop for the OPD, all of which took place before the work of this Task Force could be completed and acted on by General Convention.

A subject of extended and vigorous debate in the Task Force was whether the consensual supervision and resourcing of dioceses in episcopal searches should continue to be the sole responsibility of the Presiding Bishop acting through the OPD. It was noted that this responsibility was never assigned to the Presiding Bishop by the General Convention either by canon or resolution. While the canons place formation and continuing education of bishops within the purview of the House of Bishops, it is not a responsibility necessarily inherent exclusively in the office of the Presiding Bishop. It developed organically as described elsewhere in this report over the past sixty (60) years to meet critical unmet needs. During that same period of time the Church's understanding of the authority and responsibility of all the baptized has evolved. The canons have also evolved, for example, in providing that clergy and lay people now sit with bishops to decide matters of the discipline of bishops under Title IV. Similarly, clergy and laity now have a role in the dissolution of the relationship between a bishop and a diocese. The development and changes in the Board for Transition Ministry and the General Board of Examining Chaplains demonstrate similar evolution of the increasing role of all the orders in the formation of and decision-making regarding the ordained; issues that earlier in our history were left to the bishops or to the bishops and priests.

The OPD has identified a group of clergy and laity who act, at its recommendation, as consultants to dioceses in episcopal search processes. However, there is no other identified group of clergy and laity representative of the various stakeholders in episcopal search and election processes who have been involved in the work of the OPD on an ongoing basis. Even if there were such an informal group, it would not address the need to make provision, by way of canon or General Convention resolution, in the Church's ongoing life for the intentional and sanctioned involvement of clergy and laity in this work that is critical to all the orders.

For these reasons, and while unanimity on the Task Force was not achieved, the Task Force proposes, on a pilot basis, a new Board for Episcopal Transitions as described in the following Resolution.

**Resolution A147: Pilot Board for Episcopal Transitions**

Resolved, the House of \_\_\_\_\_ concurring, That a pilot Board for Episcopal Transitions be appointed for a period of six years commencing at the adjournment of the 79th General Convention; and be it further

Resolved, That the pilot Board be composed of up to twelve persons appointed jointly by the Presiding Bishop and President of the House of Deputies; at least two members will have served as a Transition Consultant in an episcopal search within the past three years; at least one member will have served on an episcopal search committee in an episcopal search process within the past three years; at least two members will be bishops, two will be priests or deacons and two will be lay persons; at least one member will be experienced in collecting and analyzing data; and at least one member shall be a current or former diocesan chancellor; and be it further

Resolved, That the pilot Board working in collaboration with and helping resource the Office of Pastoral Development shall be responsible for:

- revising existing resources and creating new resources to assist dioceses in the discernment, nomination, search, election, and transition processes for episcopal transitions;
- 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 Consult, 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.
- developing 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 pilot Board report semi-annually to the Executive Council and triennially to the General Convention; and be it further

*Resolved*, That if the General Convention chooses to not establish the pilot Board, the General Convention refer the above proposals of this Resolution to the Office of Pastoral Development for review and appropriate action; and be further

*Resolved*, That the amount of \$100,000 be appropriated for the organization and initial resources of the pilot Board, to include two meetings per year.

Explanation:

The Resolution establishes the pilot Board of Episcopal Transitions to collaborate with the Office of Pastoral Development. The Board comprises persons from all orders of the Church's ministry. Through that collaboration, the Board will be responsible for revising existing resources and creating new resources to assist dioceses in the discernment, nomination, search, election, and transition processes for episcopal transitions; 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; and developing 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.

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#### 4. Background, Psychological and Medical Screening Prior to Episcopal Election Nomination

This report has touched upon the need and purpose for background, psychological, and medical screening prior to nomination for election as a bishop. The Task Force believes that the screening and related issues (including who has access to the results, and when) are so important as to warrant additional treatment here.

Currently, there are no canons, rules, policies, guidelines, or processes set by General Convention that govern background, psychological, and medical screening prior to nomination for election as a bishop. In fact, the canons on the election and transition of bishops for dioceses generally only contain the following:

- Consent process for election of bishops;

- Requirement of a psychiatric and medical examination after election by a person authorized by the Presiding Bishop utilizing forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund;
- Requirement that newly elected bishops participate in the process of formation authorized by the House of Bishops under Canons III.12.1 and III.12.2.

This contrasts with the detailed canons on the formation of deacons and priests, prior to ordination, the requirement of specialized education and training prior to ordination in such areas as prevention of sexual misconduct, the Church's teaching on racism, and Title IV of the Canons. Similarly, the canons require background checks according to criteria set by a diocese's bishop and Standing Committee and psychological and medical examinations prior to ordination.

While the practice is to conduct background screening of candidates in episcopal searches, there is no Church wide canonical requirement for background screening when a diocese elects a bishop. There is no office or body charged by General Convention with developing standards or even guidelines for voluntary screening or for the screening required by the seldom used process in Canon III.11.1 (b).

Similarly, there are no canons, guidelines or standards, nor any office or body charged by General Convention with developing standards or guidelines for the review, evaluation, or sharing of information gathered in the episcopal search process, including but not limited to the background screening and any psychological or medical screening a diocese conducts prior to an episcopal election.

### ***Background Screening***

While there is no canonical or other requirement for background screening of candidates or nominees in episcopal elections, it is certainly a common practice that such screening takes place. However, each diocese is left to decide whether there will be any such screening, what the screening will involve, with whom the results of the screening will be shared, who will evaluate the information and who can make decisions to eliminate a person from the process based on the information.

There has been confusion and a lack of clarity in a number of election processes as to whether it is the Presiding Bishop, the OPD, Transition Consultant, head of the search committee, search committee as a whole, the president of the Standing Committee, the Standing Committee as a whole, or the electing convention who has the right or responsibility to review the information, determine who else should see it or be informed of its contents, and evaluate and/or make decisions about it.

### ***Psychological and Medical Screening***

Some might suggest that there is no reason to require psychological or medical screening of candidates prior to election because such screening was done before the priests were ordained. There are a number of reasons why such screening may well not be adequate. First, the Church's understanding of what constitutes adequate psychological or medical screening may have changed

since a priest was ordained. Second, the thoroughness of such screening may vary widely from diocese to diocese. Third, a person's medical and psychological health can change markedly over time.

Conducting medical and psychological screening only after election and only of the person elected is inadequate. The time, money, and emotional energy of everyone involved in the process means that once there has been an election it would require a problem of very serious magnitude before a Standing Committee would act to stop the ordination. That is not the purpose of such screening. Similarly, the bishop-elect's interest in not having medical and psychiatric concerns shared widely is not served in having the examinations after the election.

The purpose of the screening should be to allow the search committee and/or Standing Committee to discreetly consider any medical or psychological information that may be pertinent, along with all the other information gathered about potential nominees, which may adversely affect the candidate's ability to function as the bishop in that particular place in those particular circumstances. Medical and psychological conditions and history are merely one aspect of the information that, taken together with all other information, is useful in the mutual discernment of whether a particular person is appropriate for a particular position in a particular place at a particular time in the life of the Church.

Even if conducting medical and psychological screening after an election were sufficient, which they are not, the current canonical requirement is inadequate. It does not set any standards for either the medical or psychological examinations with the exception of a statement that the examiner has not "discovered any reason why the person would not be fit to undertake the work for which the person has been chosen." Canon III.11.3(a)(2)

The forms and procedures to be used for the post-election examinations are those "agreed to by the Presiding Bishop and The Church Pension Fund ... for this purpose." Canon III.11.3(a)(2). There is no procedure that has been agreed to by the Presiding Bishop and The Church Pension Fund that has been publicized.

The Task Force recommends a new canon that would require:

- 1) Background screening of all persons appearing on the ballot for election to the office of bishop, prior to formal nomination (by whatever means of nomination, including by petition or "from the floor" of the electing convention), such background screening to include, at a minimum, federal and state criminal records checks, sex offender registry checks, credit checks, verification of education, ordination and employment history, review of all complaints, charges and allegations while an ordained person.
- 2) Requiring that all records of the screening (background, medical and psychological) of the person elected and ordained be maintained permanently by the electing Diocese with a duplicate record in the Archives of The Episcopal Church.

If, as we recommend, Canon III.11 is changed to include (i) missional review, (ii) a requirement for diocesan rules or canons for episcopal elections and (iii) a requirement for consent of a majority of bishops exercising jurisdiction and a majority of Standing Committees to the holding of an episcopal election, these new requirements could be added as a new subsection 11.1(c) of Canon III.11 before the proposed missional review amendments set forth in Section VI.H of this report. If so, the amendments proposed in Section VI.H may be renumbered as III.11.1(d), etc. or simply as a new Canon III.11.1(c) if the missional review amendments are not adopted by General Convention. Accordingly, we propose the following Resolution

**Resolution A148: Amend Canons III.11.1, III.11.3 and III.11.9(c)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.1 is hereby amended to add the following, And the subsequent subsections renumbered accordingly:

(c) *Prior to any person's name being placed on the ballot 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:*

- (i) 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;*
- (ii) each nominee evaluated by a licensed medical doctor approved by the Standing Committee;*
- (iii) each nominee evaluated by a licensed psychologist approved by the Standing Committee, with psychiatric referral if desired or necessary;*
- (iv) each nominee evaluated for substance, chemical and alcohol use and abuse whether as part of the medical examination, psychological examination or otherwise by professionals approved by the Standing Committee;*

*Reports of all background checks, medical, psychological and substance, chemical or alcohol use and abuse evaluations shall be kept permanently on file and remain a part of the permanent diocesan record for the person elected and consented to by bishops exercising jurisdiction and Standing Committees.*

And be it further

Resolved, That Canon III.11.1(b) is hereby amended to read as follows:

Canon III.11.1(b)

(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 provisions for adequate background checks.
- (2) If either option in Sec. 1(b) is chosen, the *background checks and evaluations required by Canon III.11.x(y) shall be carried out by the special Joint Nominating Committee unless the Diocesan Convention has otherwise provided for the nominating process. 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*

And be it further

*Resolved*, That Canon III.11.3 is hereby amended to read 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 other 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~~ *psychologist and substance abuse professional*, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition *and for substance, chemical and alcohol use and abuse* 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:

And be it further

*Resolved*, That Canon III.11.9(c) is hereby amended to read as follows:

Canon III.11.9(c)

(c) Missionary Bishops

(1) The election of a person to be a Bishop in a Missionary Diocese shall be held in accordance with the procedures set forth in the Constitution and Canons of this Church.

(2) The Convention of a Missionary Diocese may, in lieu of electing a Bishop, request that such election be made on its behalf by the Synod of the Province, or the House of Bishops of the Province subject to confirmation of the Provincial Council, or the Regional Council of Churches in communion with this Church of which the Diocese is a member. A Certificate of the Election, signed by the presiding officer and the Secretary of the Synod or Provincial House of Bishops, or Regional Council, and a testimonial in the form required in Canon III.11 signed by a constitutional majority of the Synod, Provincial House of Bishops or Regional Council, shall be transmitted by its presiding officer to the Standing Committee of the Missionary Diocese on whose behalf such election was made. The Standing Committee shall thereupon proceed as set forth in Canon III.11, the above Certification of Election and Testimonial serving in lieu of evidence of election and testimonial therein required. *If this option is used the background checks and evaluations required by Canon III.11.1(b) shall be carried out by the Synod of the Province or the House of Bishops of the Province, whichever body conducts the election.*

(3) The Convention of a Missionary Diocese may, in lieu of electing a Bishop, request that such election may be made on its behalf by the House of Bishops. Such choice shall be subject to confirmation by a majority of the Standing Committees of the several Dioceses. The medical certificate as required in Canon III.11 shall also be required of Missionary Bishops-elect.

- (i) When the House of Bishops is to elect a Bishop for a Missionary Diocese within a given Province, the President of the Province may convene the Synod of the Province prior to the meeting of the House of Bishops at which a Bishop for such Missionary Diocese is to be elected. The Synod of the Province may thereupon nominate not exceeding three persons to the House of Bishops for that office. It shall be the duty of the President of the Province to transmit such nominations, if any be made, to the Presiding Officer of the House of Bishops, communicate the same to the Bishops, along with other nominations that have been made, in accordance with the Rules of Order of the House. Each Province containing a Missionary Diocese shall, by Ordinance, provide the manner of convening the Synod and making such nomination. *If the Synod of the Province nominates persons as provided in this subsection, the background checks and evaluations required by Canon III.11.1(b) shall be carried out by Synod of the Province. The House of Bishops shall carry out the background checks and evaluations required by Canon III.11.1(b) for all persons nominated in accordance with the Rules of Order of the House.*

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The Task Force considered including in the proposed canonical amendments on background screening and evaluations specific requirements covering with whom information about the screening and evaluations must be shared at various points in the search and election process.



However, it became clear that the issues surrounding evaluation and disclosure of such information are especially sensitive and potentially complex. Issues include:

- What information is relevant to the search and election process;
- Who is equipped or should be equipped to evaluate the information;
- What information, if any, should automatically eliminate a person from further consideration in the process;
- What information, taken together with all other information, may contribute to a person being eliminated from further consideration in the process;
- If a person is included on the ballot, by the nominating body, by petition or from the floor, what information, if any, should be shared with the clergy and lay delegates electing the bishop;
- If a person is elected, what information, if any, should be shared with the Bishops of the Church and the Standing Committees who vote whether or not to consent to the election.

These issues require additional study and conversation. For those reasons, the Task Force proposes that the pilot Board for Episcopal Transitions consider these issues and report to the 80th General Convention.

## **V. FORMATION FOR THE MINISTRY OF A BISHOP**

### **A. The Ministry We Share.**

The Task Force is mindful of the orders of ministry specified in the Catechism (*The Book of Common Prayer*, p. 855 ff.) and instituted through the sacramental rites of baptism and ordination. While each order has responsibilities specific to it, only one foundational expectation is common to each: "... to represent Christ and his Church". Using a biblical image, we are all members of "the body of Christ" (I Corinthians 12:27.) As such, each has a specific role to carry out to "represent Christ and his Church" according to the order of ministry to which the Church has called us. To that end, each order must be formed to do its particular work within the body of Christ

### **B. The Ministry of Bishops.**

The Gospels tell us that Jesus called to himself twelve disciples who became generally known as the Apostles, literally "messengers." These Apostles were sent forth to carry out the ministry Jesus commissioned them to accomplish with the promised gift of the Holy Spirit (Matthew 28:16-20; Acts 1:8-9.) To prepare the Apostles for this ministry, Jesus instructed and formed them by modeling God's reconciling love for the world in his life, teaching, death, resurrection and ascension.

The *Book of Common Prayer* specifies that a bishop is

“to represent Christ and his Church, particularly as apostle, chief priest, and pastor of a diocese; to guard the faith, unity and discipline of the whole Church; to proclaim the Word of God; to act in Christ’s name for the reconciliation of the world and the building up of the Church; and to ordain others to continue Christ’s ministry.” (*Ibid.*, p. 855)

After the Resurrection, as the Church grew and expanded, it became the practice of the Apostles to discern who should be appointed (by the sacramental rite of laying-on-of-hands) to share as the Church’s ministers in the order of bishop. Arguably, the earliest example of this role being fulfilled by the Apostles is their selection of Matthias to succeed Judas. They also acted together to select deacons to carry out particular aspects of ministry (Acts 6:1-6) so that the bishops could be freed to focus on their specific call of apostleship. Out of these apostolic actions that have become part of the Church’s historic tradition, the various orders of ministry have evolved over the centuries.

Tradition says the Church traces its line of succession to St. James of Jerusalem, the brother of Jesus, and the first bishop (Greek, *episkopos* or “overseer”) selected by the Apostolic band. This practice of the Church to choose successor bishops for apostolic ministry is commonly called “Apostolic Succession.” The importance of the role of “the Historic Episcopate,” is recognized as one of only four principles for a Church deemed to be faithful to the teachings of Jesus. The Chicago-Lambeth Quadrilateral, (*The Book of Common Prayer*, pp. 877-878) describes that fourth principle as: “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 His Church.”

That is as true today as it was when the original Apostles were chosen by Jesus.

Episcopal ministry is a new and different call. Our theology and ecclesiology suggest that episcopal ministry is an entirely distinct order and represents a new call. Research on the role of the bishop also suggests that the work of a bishop represents a seismic vocational shift.

### **C. What Bishops Need to Know, and When.**

The current curriculum of the College for Bishops is based on longitudinal studies of the needs of bishops that emerged as a result of a three-year research project, funded by a Louisville Grant of the Lilly Foundation, to identify and develop educational needs of bishops in the early years of their time as bishop. From this research, the initial and still foundational curricula, “Living Our Vows”, was produced. Since that beginning, all offerings are evaluated by participants using professionally designed questionnaires reviewed by the curriculum committee. That committee also draws on input from bishops and knowledgeable clergy and laity.

Major components of the current formation curriculum include:

A 90-Day Companion Program provides for each bishop-elect an experienced bishop to assist in addressing many of the immediate practical considerations for the transition period from election to ordination.

A New Bishops and Spouses' Conference assists the newly-elected bishops and their spouses in forming community and in examining transitional issues that most new bishop and bishop families face.

The Living Our Vows Residency provides opportunities for new bishops to gather in a community of new bishops, to reflect on the gifts, responsibilities and authority of the episcopate and to acquire resources to lead and serve dioceses effectively and faithfully. This is a five-day residency program for each of the first three years of a new bishop's episcopate.

This residency program has also enjoyed wide acceptance outside the United States in the Anglican Communion. For example, new bishops from Canada, Cuba, Dominican Republic, El Salvador, Ireland, Mexico, New Zealand, Scotland, and Tanzania have participated in the Residency Program and, thereby, been exposed to the formation and polity of The Episcopal Church.

The Living Our Vows Peer Coaching provides a three-year collegial relationship for a new bishop and an experienced bishop trained as a peer coach under the direction of a professional and licensed Life Coach. The program supports spiritual health and personal development designed to equip new bishops with skills for transformative leadership.

Continuing education curricula for the study of specific matters challenging of the 21st Century church are offered at each meeting of the House of Bishops and in a variety of other venues and formats.

The Leadership Institute is a website available to bishops that offers a regularly updated, ever-changing series of useful articles on leadership and collaboration from across a variety of secular and religious sources.

An important and somewhat unique course is The William and Sidney Sanders Conference on Orderly Transition. It provides an opportunity for bishops and spouses to prepare for a smooth and healthy transition into their retirement years and to help their respective diocese make its way forward in its process of ordaining its next bishop.

<b>Program</b>	<b>Post-election Pre-Ordination</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Years to Retirement</b>
<b>Short Courses</b>		XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXXXX
<b>Small Group Study</b>					XXXX	XXXX	XXXX	

<b>HOB Continuing Education</b>		XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXXXX
<b>CREDO for Bishops</b>						XXXX		
<b>Conference on Orderly Transitions</b>								XXXXXX
<b>90 Day Companion Program</b>	XXXXXXX							
<b>New Bishops &amp; Spouses/Partners' Conf.</b>		XXXX						
<b>Living Our Vows</b>			XXXX	XXXX	XXXX			

**D. Who Provides the Curriculum Content?**

As noted above, subdivisions 12.1 and 12.2 of Canon III.12 assign to the House of Bishops the primary responsibility for the initial three years of formation of bishops and for their continuing education.

The House of Bishops has determined that the College for Bishops is the vehicle best suited for the discharge of its responsibilities for the formation and continuing education of bishops. The College’s governing board includes bishops but also knowledgeable and experienced clergy and lay members. They participate in the identification of subjects for the curriculum, the updating of courses and material, the content of the subjects, and the presentation of the curriculum’s offerings to bishops attending the College. This allows the College to ensure that the curriculum is current and effective and to meet the requirements of its purpose:

“To provide opportunities for education and formation that will strengthen bishops in their personal lives, as diocesan leaders in God’s mission, and in their vocation to God, as a community of bishops in service to The Episcopal Church.”

Prior to July 2017 the College functioned as a part of the OPD, at which time, the Presiding Bishop removed the College from the OPD and established it directly within the Office of the Presiding Bishop. It is currently exploring ways to expand the opportunities for qualified clergy and laity to participate in the development and presentation of existing and new curricula.

**E. Governance of the College for Bishops**

All members of the Task Force have worked together to learn about the formation and continuing education of bishops being done through the College for Bishops, and to report that work here. There is, however, a conflict of views among Task Force members about the governance structure of the College. Some members feel there should be changes in the governance of the College for Bishops as

are described in the Resolution below. Other members do not share that concern. The Task Force offers the Resolution for the due consideration and action of the General Convention.

**Resolution A149: Reorganize the Board of Directors of The College for Bishops**

Resolved, The House of \_\_\_\_\_ concurring;

That “The Right Reverend David E. and Helen R. Richards College for Bishops of the Episcopal Church” is urged to amend its Certificate of Incorporation and By-laws to provide that:

- the directors of the corporation be jointly nominated by the Presiding Bishop and President of the House of Deputies,
- the directors of the corporation be elected by the House of Bishops,
- the directors of the corporation be confirmed by the House of Deputies of the General Convention,
- that vacancies on the Board that occur more than six months prior to the convening of the next General Convention be filled by joint nomination of the Presiding Bishop and the President of the House of Deputies and election by the Board of the College, and
- that the President of the House of Deputies and the Presiding Bishop be members of the board of directors, ex officio.

Explanation:

This Resolution would change the College for Bishops governing board to resemble many other Church wide governing boards – by having board members jointly nominated by both presiding officers in a collaborative process likely to result in a board more equally comprising the orders of ministry of the Church, all of whom have a vital stake in the calling and formation of bishops.

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**VI. OTHER CANONICAL AND STRUCTURAL CONSIDERATIONS**

**A. Introduction**

As discussed above, the Task Force engaged in a wide range of discussions regarding the process of how bishops may be chosen by dioceses. Article II, Section 1 of the Constitution provides that “[i]n every Diocese the Bishop or Bishop Coadjutor shall be chosen agreeably to rules prescribed by the Convention of that Diocese...” Canon III.11.1(a) further provides that “[D]iscernment 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 Constitution and Canons of this Church.” In addition,

pursuant to Canon III.11.1(b), a diocese may request that the House of Bishops of the Province of which the diocese is a part may elect its bishop, subject to confirmation by the Provincial Synod, or it may request that the election be made on behalf of the diocese by the House of Bishops. The Presiding Bishop is elected at General Convention by the House of Bishops and confirmed by the House of Deputies. The current polity of our Church has a strong emphasis on having bishops be elected, with the exception of Assistant Bishops, who are persons who have already been elected and consecrated as bishops and who are appointed by the Bishop Diocesan, if the Standing Committee and Diocesan Convention approve the creation of the position of Assistant Bishop pursuant to Canon III.12.5. Therefore, even when a bishop is appointed, there is the opportunity for voting by the Standing Committee and Diocesan Convention. The procedures followed in elections, however, are left to the dioceses.

Alternatively, in many other jurisdictions in the Anglican Communion, including the Church of England, bishops are often appointed instead of elected. When the Church of England approved allowing women to serve as bishops in 2014, the first female bishop, Libby Lane, was appointed (2015). Since 2015 a total of 11 women (nine Suffragans and two Diocesans) have been appointed to serve as bishops in the Church of England, which has approximately 110 active bishops. One of the 11 women previously appointed was appointed at the end of 2017 to serve as Bishop of London, the third highest position in the Church of England after the Archbishops of Canterbury and York. In The Episcopal Church, which has approximately 130 active bishops (including Assistant Bishops), and which ordained its first female bishop in 1989, there are currently six women serving as Bishops Diocesan and nine women serving as Bishops Suffragan, all of whom were elected. Since 1989 a total of 26 women have been elected to serve as bishops (14 Suffragans and 12 Diocesans) and one woman, Katharine Jefferts Schori, has been elected Presiding Bishop, serving from 2006 until 2015.

The Task Force considered the possibility of changing to an appointment system or perhaps a modified system in which some bishops are appointed and some are elected. After a review of how bishops are chosen in other parts of the Anglican Communion and the history of allowing dioceses in our Church to determine their own processes for election, the Task Force decided to continue to honor the historical system our Church uses and keep in place an elected episcopate governed to a large extent by the electing diocese. Earlier, this report proposed ways dioceses can or should implement processes and changes in their elections that will encourage diversity in the episcopate, facilitate discernment by those who may feel called to the episcopate, clarify the different classifications of bishops and the capacities in which they serve, provide for Missional Reviews and assessments by dioceses to help determine their needs and hopes for the future, and other issues set forth in the Task Force's mandate.

Section VI sets forth the amendments to the Constitution and Canons that would be necessary to implement these Task Force recommendations (some canonical amendments are also proposed in Section IV). In addition, some of the proposed amendments serve to clarify language or to correct

grammar, punctuation, or cross-references. The aim of these clarifying changes is to promote consistent use of language throughout the canons.

### **B. Primary Role of Dioceses in Episcopal Elections**

As noted above and described in Sections IV.B and VI.A, the Task Force decided against proposing substantial changes to the Church's current canonical mandate for electing bishops. Rather than change the fundamental nature of our polity, the Task Force decided to leave the primary responsibility for election processes with the dioceses and focus on providing best practices for elections.

### **C. Clarification of Titles and Roles of Bishops**

The Task Force discussed the types of bishops that are currently included in the canons as well as other types that are not canonical. The canons provide for Bishops Diocesan, Bishops Coadjutor, Bishops Suffragan, Assistant Bishops, the Bishop for Federal Ministries, Missionary Bishops (none at present), Bishops for Area Missions (currently Navajoland), and Bishops for Foreign Lands (currently, the Convocation of Episcopal Churches in Europe), as well as bishops serving on a provisional basis. Types of bishops that have recently served or currently serve in The Episcopal Church but are not provided for in the Canons include Assisting Bishops (called by the Bishop Diocesan but who do not go through a general church canonical process for approval), Interim Bishops, and Bishops *Pro Tempore*. These types of bishops do not include bishops who may be serving from time to time in a diocese in a capacity generally referred to as episcopal 'supply' work. Bishops serving in the supply capacity are understood by the Task Force to be those bishops whose role is limited to teaching, preaching or providing sacramental rites at the invitation of the Ecclesiastical Authority of the diocese where the "supply" bishop has been invited to participate for particular times and places as described above.

The Task Force considered reducing the types of Bishops set forth in the Canons to two types: Bishops Diocesan and "other" Bishops that would be essentially the equivalent of Assistant Bishops. The Task Force, however, determined that the ministries of the different types of Bishops set forth in the Canons still play an important role and should not be eliminated at this time. Instead the Task Force recommends that, with the exception of Supply Bishops and Bishops Provisional (new canonical titles that are explained below), all bishops should go through appropriate Church wide processes, including approval by bishops exercising jurisdiction and Standing Committees of the dioceses as well as local approvals by the Diocesan Convention and Standing Committee of the Diocese in which the bishop is to serve.

In addition, the Constitution and Canons are not consistent in their use of the terms Diocesan Bishop, Bishop Diocesan, Suffragan Bishop and Bishop Suffragan. The terms Bishop Diocesan and Bishop Suffragan are the terms used most frequently and the Task Force is proposing changes to make their use consistent throughout the Constitution and Canons. These amendments to the Constitution and Canons will achieve consistency and also set forth in the canons names for certain roles assumed by

bishops that have gone by different names in practice, including Bishop Diocesan *Pro Tempore*, who can be (i) a Bishop Coadjutor or Bishop Suffragan of a diocese that is temporarily or permanently without a Bishop Diocesan or (ii) a bishop of this Church who is concurrently serving in another diocese or a resigned bishop of this Church, either of whom must be approved by the Diocesan Convention of the diocese that is temporarily or permanently without a Bishop Diocesan. A Bishop Diocesan *Pro Tempore* exercises jurisdiction on a temporary basis in a diocese until a new Bishop Diocesan is elected or while the Bishop Diocesan is absent for a period of time (Article II.5; Canon III.13.1). The other new titles are Supply Bishop (a bishop performing occasional episcopal acts or officiating by preaching, ministering the Sacraments, or holding occasional public services in a Diocese (Canon III.12.3(f)); and Bishop Provisional (a bishop serving on a temporary basis but not exercising jurisdiction when there is no bishop in a diocese for a limited period of time (Canon III.13.2)).

A chart summarizing the types and titles of bishops is set forth in the Supplementary Materials.

#### **D. Assistant Bishops**

##### 1. Election and Tenure

The current provisions of Canon III.12.5 have been interpreted in a variety of ways with respect to the requirements and process for appointing an Assistant Bishop. The Task Force's proposed amendments to Canon III.12.5 would change the position of Assistant Bishop from that of an appointed position to an elected position. Under the proposed amendments a diocese desiring to call for an election of an Assistant Bishop would first need to go through a missional review process (Canon III.11.1(c)) and the bishops with jurisdiction and Standing Committees would need to consent to the holding of an election. Following receipt of those consents and the completion of any other diocesan discernment and planning steps, the diocesan convention would elect an Assistant Bishop. It would be permissible to have only one candidate for the position nominated, and the candidate(s) could be priests or bishops who are qualified to stand for election. The requirement that the tenure of the service of the Assistant Bishop in a diocese ends with the termination of jurisdiction of the Bishop Diocesan has not been changed. A diocese would be limited to three (3) Assistant Bishops.

These amendments make the process of choosing of an Assistant Bishop more similar to the process of choosing Bishops Diocesan and Bishops Suffragan. The election process adds greater participation of the laity and clergy in the process of choosing an Assistant Bishop, even if only one person is eventually nominated for the position. Subjecting the process to a missional review and consent process would help the diocese determine whether an Assistant Bishop is needed or whether other options should be explored. The process will allow dioceses to elect an Assistant Bishop from a more diverse pool of potential candidates rather than the current method of choosing someone who has already been elected as a bishop from a pool that is largely composed of white males. In order to find a non-white Bishop to appoint as Assistant Bishop, dioceses often look outside the Church's United States dioceses, thus taking talent that may be needed locally away from that Bishop's current diocese. The amendment will give Dioceses the option of electing an Assistant Bishop from among



the diversity of priests of U.S. dioceses. In addition, when the Assistant Bishop's tenure ends, he or she will have a track record that may be helpful in a subsequent episcopal election.

## 2. Assistant Bishops from Jurisdictions Other than The Episcopal Church

In its review of Assistant Bishops, the Task Force determined that processes with respect to bishops from other jurisdictions needed more prescriptive guidance in the canons. In order to help ensure that bishops from other jurisdictions have a basic knowledge of The Episcopal Church and have received training in relevant areas required for ordination in the Episcopal, certain requirements for receiving clergy from other jurisdictions set forth in Canon III.10 were added to Canon III.12.5.

### **E. Consent Process and Missional Review**

The Task Force recommends reducing the period for the bishops and Standing Committees of the dioceses to approve the election of a bishop, from 120 days to 60 days in Canons III.11.3(a) and Canon III.11.4. With widespread ability to vote and communicate electronically, a shortened consent period should be feasible and will allow a newly elected bishop to begin work with the diocese more quickly. The shorter transition period will be especially helpful to dioceses that are trying to move in a new direction or make changes in their processes or ministries.

The Task Force also recommends amendments to Canon III.11.1 to provide for the consents of a majority of the bishops exercising jurisdiction and a majority of the Standing Committees before a diocese or other jurisdiction may hold an election of a Bishop Diocesan. The amendments would consolidate into one canon the list of bishops for which consent to the holding of an election must be obtained. This would be a new requirement for the election of Bishops Diocesan, Missionary Bishops and Assistant Bishops. Pre-election consents are currently required for the election of Bishops Coadjutor (Canon III.11.9(a)(1)) and Bishops Suffragan (Canon III.11.9(b)(2)). The amendments retain the requirement that the consents of the majority of bishops exercising jurisdiction and of the Standing Committees be required *after* the election with respect to the bishop-elect. The amendments work in tandem with the proposed addition of a missional review process to Canon III.11.1 as described in Section IV.A of this report.

The proposed amendments, including the missional review, are designed to encourage dioceses to review periodically their strengths and challenges as well as discern the type of leadership they need for the future. This discernment will be done both within the diocese and also in consultation with neighboring dioceses, and with the assistance of consultants. While the missional review process, especially if not performed regularly, may increase the time for an election process, the reduction of the consent period will help reduce the total time. The missional review process would commence as a requirement for all elections held on or after January 1, 2019, and would be encouraged for all elections held prior to that time.

Similarly, requiring that a diocese obtain consents from a majority of bishops and Standing Committees to hold an election of a Bishops Diocesan, Assistant Bishop (if the proposed amendments

with respect to Assistant Bishops are adopted) or Missionary Bishops, in addition to the current requirement to obtain consents prior to the election of a Bishop Coadjutor or Bishop Suffragan, helps dioceses determine in advance of expending resources in pursuing an election whether other options should be considered. At least one of the same rationales for the current requirement of obtaining consents for the election of Bishops Coadjutor and Bishops Suffragan applies to these elections as well: to help ensure that a diocese has examined whether the election is the best option at that time, or whether the better course might be for the diocese to have a bishop serving provisionally for a period of time, whether to partner with another diocese to share resources, whether to consider a potential merger or other options.

#### **F. Clarification of “Vacancy in the Episcopate”**

The Standing Commission on Structure, Governance, Constitution and Canons received a question about what constitutes a vacancy in the episcopate, including whether there may be a vacancy when a bishop is on sabbatical or is temporarily incapacitated due to illness, injury or other circumstances, and referred the question to the Task Force. The Task Force considered these issues in the context of the existing canons and other factors, including the relative ease of communicating with a bishop who is on sabbatical under most circumstances. The circumstances under which there is a vacancy in the episcopacy, including vacancy as discussed in Canon III.5.1(c), are clarified in proposed Canon III.12.4(d). Short-term absences, illnesses, or sabbaticals do not constitute a “vacancy” and bishops are encouraged to provide for coverage of their duties when they are away from their diocesan office for these and similar reasons. In most of these cases the bishop can usually be reached within a reasonable time to make a decision, even in an emergency. A true vacancy is an event that gives rise to the need for longer-term coverage of episcopal duties because the bishop is not expected to return to office within a reasonable time or not expected to return at all.

#### **G. Proposed Amendments to the Constitution**

The Task Force recommends the following amendments to the Constitution:

##### **Resolution A150: Amend Article I.2 of the Constitution**

Resolved, the House of \_\_\_\_\_ concurring, That Article I, Section 2 of the Constitution is hereby amended to read as follows:

##### Article I

Sec. 2. Each Bishop of this Church having jurisdiction, every Bishop Coadjutor, every *Bishop Suffragan* ~~Bishop~~, every Assistant Bishop, and every Bishop who by reason of advanced age or bodily infirmity, or who, under an election to an office created by the General Convention, or for reasons of mission strategy determined by action of the General Convention or the House of Bishops, has resigned a jurisdiction, shall have a seat and a vote in the House of Bishops. A majority of all Bishops entitled to

vote, exclusive of Bishops who have resigned their jurisdiction or positions, shall be necessary to constitute a quorum for the transaction of business. *Bishops who exercise or have jurisdiction are those who exercise ecclesiastical authority in a diocese or other jurisdiction of this Church.*

Explanation:

The amendment in the first sentence makes the use of the term “Bishop Suffragan” consistent throughout the Constitution and Canons. The final sentence clarifies the meaning of “exercising” or “having” jurisdiction, including jurisdiction over areas that are not dioceses such as Navajoland, the Convocation of Episcopal Churches in Europe (over which the Presiding Bishop exercises jurisdiction), and Guam (over which the Presiding Bishop exercises jurisdiction).

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**Resolution A151: Amend Article II.4-8 of the Constitution**

Resolved, the House of \_\_\_\_\_ concurring, That Article II.4-8 of the Constitution is hereby amended to read as follows:

ARTICLE II

Sec. 4. It shall be lawful for a Diocese, at the request of the Bishop of that Diocese, to elect not more than two ~~Suffragan~~ Bishops *Suffragan*, without right of succession, and with seat and vote in the House of Bishops. A ~~Suffragan~~ Bishop *Suffragan* shall be consecrated and hold office under such conditions and limitations other than those provided in this Article as may be provided by Canons of the General Convention. A ~~Suffragan~~ Bishop *Suffragan* shall be eligible for election as Bishop *Diocesan* or Bishop Coadjutor of a Diocese, or as a *Bishop Suffragan* in another Diocese.

Sec. 5. It shall be lawful for a Diocese to prescribe by the Constitution and Canons of such Diocese that upon the death, *removal or deposition* of the Bishop or *if the Bishop resigns or is removed from office pursuant to Canon III.12.12(7)*, a ~~Suffragan~~ Bishop *Suffragan* of that Diocese may ~~be placed in charge of such Diocese and~~ become temporarily the Ecclesiastical Authority thereof *serving as the Bishop Diocesan Pro Tempore* until such time as a new Bishop shall be chosen and consecrated; or that during the disability or absence of the Bishop, a Bishop *Suffragan* of that Diocese may be placed in charge of such diocese and become temporarily the Ecclesiastical Authority thereof *serving as the Bishop Diocesan Pro Tempore of the Diocese*.

Sec. 6. A Bishop may not resign jurisdiction without the consent of the House of Bishops.

Sec. 7. It shall be lawful for the House of Bishops to elect a ~~Suffragan~~ Bishop *Suffragan* who, under the direction of the Presiding Bishop, shall be in charge of the work of those chaplains in the Armed Forces of the United States, Veterans’ Administration Medical Centers, and Federal Correctional Institutions who are ordained Ministers of this Church. The ~~Suffragan~~ Bishop *Suffragan* so elected shall be consecrated and hold office under such conditions and limitations other than those provided in this

Article as may be provided by Canons of the General Convention. The ~~Suffragan~~ Bishop *Suffragan* shall be eligible for election as Bishop *Diocesan*, ~~or~~ Bishop Coadjutor or ~~Suffragan~~ Bishop *Suffragan* of a Diocese.

Sec. 8. A Bishop *Diocesan* or Coadjutor who has ~~for at least five years next preceding exercised jurisdiction as the Ordinary,~~ served as the Bishop *Diocesan* or as the Bishop Coadjutor, of a Diocese for any period of time, may be elected as Bishop *Diocesan*, Bishop Coadjutor, or ~~Suffragan~~ Bishop *Suffragan* of another Diocese only if five or more years have passed since the Bishop first served as Bishop *Diocesan* or Bishop Coadjutor of the Diocese in which the Bishop is currently or last served as Bishop *Diocesan* or Bishop Coadjutor. Before acceptance of such election a resignation of jurisdiction in the Diocese in which the Bishop is then serving, conditioned on the required consents of the Bishops and Standing Committees of the Church to such election, shall be submitted to the House of Bishops, and also, if the Bishop be a Bishop Coadjutor, a renunciation of the right of succession. Such resignation, and renunciation of the right of succession in the case of a Bishop Coadjutor, shall require the consent of the House of Bishops.

Explanation:

The amendments make the titles of bishops consistent throughout the Constitution and Canons. The amendment to Section 5 clarifies that a Bishop *Suffragan* may be placed in charge of a diocese and exercise jurisdiction as the Bishop *Diocesan Pro Tempore* until a successor is consecrated if the Bishop *Diocesan* dies, resigns or is removed from office or until the Bishop *Diocesan* returns to office if the absence is temporary. The amendment to Section 8 clarifies that a total of five years of combined service, served consecutively, as Bishop Coadjutor and then Bishop *Diocesan* is required before the bishop may be elected elsewhere.

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**Resolution A152: Amend Article III of the Constitution**

Resolved, the House of \_\_\_\_\_ concurring, That Article III of the Constitution is hereby amended to read as follows:

ARTICLE III

Bishops may be consecrated for foreign lands upon due application therefrom, with the approbation of a majority of the Bishops of this Church entitled to vote in the House of Bishops, certified to the Presiding Bishop; under such conditions as may be prescribed by Canons of the General Convention. Bishops so consecrated shall not be eligible to the office of *Diocesan* or of-Bishop Coadjutor of any Diocese in the United States or be entitled to vote in the House of Bishops, nor shall they perform any act of the episcopal office in any Diocese or Missionary Diocese of this Church, unless requested so to do by the Ecclesiastical Authority thereof. If a Bishop so consecrated shall be subsequently duly

elected as a Bishop of a Missionary Diocese of this Church, such election shall then confer all the rights and privileges given in the ~~Canon~~ Canons to such Bishops.

Explanation:

The amendment corrects a typographical error.

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### **Resolution A153: Amend Article IV of the Constitution**

Resolved, the House of \_\_\_\_\_ concurring, That Article IV of the Constitution is hereby amended to read as follows:

#### ARTICLE IV

In every Diocese a Standing Committee shall be elected by the Convention thereof, except that provision for filling vacancies between meetings of the Convention may be prescribed by the Canons of the respective Dioceses. When there is a Bishop in charge of the Diocese, the Standing Committee shall be the Bishop's Council of Advice. If there be no Bishop or Bishop Coadjutor or Bishop Suffragan ~~Bishop~~ canonically authorized to act, the Standing Committee shall be the Ecclesiastical Authority of the Diocese for all purposes declared by the General Convention. The rights and duties of the Standing Committee, except as provided in the Constitution and Canons of the General Convention, may be prescribed by the Canons of the respective Dioceses.

Explanation:

The amendment makes the titles of bishops consistent throughout the Constitution and Canons.

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## **H. Proposed Amendments to the Canons**

### **Resolution A154: Amend Canon I.13.3(a)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon I.13.3(a) is hereby amended to read as follows:

Sec. 3 (a) Where Parish boundaries are not defined by law, or settled by Diocesan Authority *action of the Convention of the Diocese* under Section 2 of this Canon, or are not otherwise settled, they shall be defined by the civil divisions of the State as follows:

Explanation:

This amendment removes the nonspecific term, "Diocesan Authority," and substitutes clearer language, conforming to the term "Convention of the Diocese" used elsewhere in the canons.

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**Resolution A155: Amend Canon III.5.1 (c)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.5.1 (c) is hereby amended to read as follows:

(c) In case of a vacancy in the episcopate in a Diocese, as defined in Canon III.12.4(d), the Ecclesiastical Authority may authorize and request the President of the House of Bishops of the Province to take order for an ordination.

Explanation:

This amendment clarifies that the term vacancy is a term defined in the Canons (see proposed Canon III.12.4(d)).

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**Resolution A156: Amend Canon III.11.1**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.1 is hereby amended to read as follows:

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.

(b) With respect to the election of a *Bishop Diocesan*, *Bishop Coadjutor*, *Bishop Suffragan* or *Assistant Bishop*, the Diocese or, in the case of a *Missionary Bishop*, the *Missionary Diocese* or *House of Bishop* in accordance with the decision of the *Missionary Diocese* pursuant to Canon III.11.9(c)(1)-(3), shall establish a nominating process either by Canon or by the adoption of rules and procedure procedures for the election of the Bishop Suffragan at a regular or special Diocesan Convention with sufficient time preceding the election of the Bishop Suffragan. *The election will be held in accordance with this Canon III.11.*

(c) (i) *No more than twelve months before a Diocese or Missionary Diocese requests the consents under subsection (d) to holding an election of a Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, Assistant Bishop, or Missionary Bishop, the Diocese or Missionary Diocese shall complete a missional review of the Diocese to ascertain and articulate the needs, hopes, aspirations, and resources of the diocese as it participates in God's mission. The missional review shall include consultation with neighboring dioceses and should utilize extra-diocesan consultants when possible. The requirement of a missional review shall apply to elections held on or after January 1, 2019, and this sentence shall be deleted from the canons at the adjournment of the 80th General Convention without the necessity of further action of the General Convention unless the 80th General Convention determines otherwise.*

(ii) *The results of such a missional review shall be communicated to the Presiding Bishop and Executive Council of The Episcopal Church who shall each offer an assessment of the Review.*

(iii) *The assessments of the Presiding Bishop and Executive Council shall be communicated to each Bishop exercising jurisdiction and Standing Committee in advance of their consent to the call of the election of the Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, Assistant Bishop, or Missionary Bishop.*

(d) *Before the election of a Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, Assistant Bishop, or Missionary Bishop in a Diocese or Missionary Diocese, the consent to the holding of the election from a majority of the Bishops exercising jurisdiction and a majority of the several Standing Committees must be obtained.*

(e) *The consent of a majority of the Bishops exercising jurisdiction and the majority of Standing Committees must be obtained to the election of the person to serve as Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, Assistant Bishop, or Missionary Bishop as set forth In Canons III.11.3.*

~~(b)~~ (f) *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)~~ 1(f) 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)~~ 1(f) 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)~~ (g) *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) (h) No Diocese shall elect a Bishop within thirty days before a meeting of the General Convention.

Explanation:

The amendments provide that a missional review be completed, and the consents of a majority of the bishops exercising jurisdiction and the Standing Committees of the dioceses be obtained, before a diocese or missionary diocese is authorized to proceed with the election of a Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, Assistant Bishop, or Missionary Bishop. The Canons currently provide that, prior to holding an election for a Bishop Coadjutor or a Bishop Suffragan, a diocese must receive the consent of the bishops and Standing Committees; this amendment extends that requirement to other episcopal elections. The pilot Board for Episcopal Transitions proposed in Section IV.C.3 of this report would aid dioceses engaging in a missional review to obtain the services of missional review consultants.

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**Resolution A157: Amend Canon III.11.2**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.2 is hereby amended to read as follows:

Sec. 2. It shall be lawful, within six months prior to the effective date of the resignation of a ~~Diocesan~~ Bishop *Diocesan*, for the Bishop, with the advice and consent of the Standing Committee, to call a special meeting of the Convention of the Diocese to elect a successor; provided that if the Convention is to meet in regular session meanwhile, it may hold the election during the regular session. The proceedings incident to ~~reparation~~ *preparation* for the ordination of the successor shall be as provided in this Canon; but the Presiding Bishop shall not take order for the ordination to be on any date prior to that upon which the resignation is to become effective.

Explanation:

These amendments would make the titles of bishops consistent throughout the Constitution and Canons and correct a typographical error.

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**Resolution A158: Amend Canon III.11.3(a)(1)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.3(a)(1) is hereby amended to read as follows:

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, *and if a Priest, is a Priest in good standing of this Church;*

Explanation:

The amendment clarifies that one of the qualifications for being elected a bishop of a diocese under this section that if the person elected is a priest (i.e., not previously elected a bishop), then he or she must be a priest in good standing of this Church.

\*\*\*

**Resolution A159: Amend Canon III.11.3(a) (third paragraph) and Canon III.11.4**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.3(a) (third paragraph) and Canon III.11.4 are hereby amended to read as follows:

Sec. 3 (a) (third paragraph)

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 sixty days*. Each Standing Committee, in not more than ~~one hundred and twenty~~ sixty 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.

Sec. 4 In case a majority of all the Standing Committees of the Dioceses do not consent to the ordination of the Bishop-elect within ~~one hundred and twenty~~ sixty 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~~ sixty 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 amendments shorten the period for obtaining consents to the ordination of a bishop-elect from 120 days to 60 days.

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**Resolution A160: Amend Canon III.11.9(a)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.9(a) is hereby amended to read as follows:

Sec. 9. Other Bishops

(a) Bishops Coadjutor

(1) If a Diocese discerns a need for another Bishop in order to provide for orderly transition, the Diocese may elect a Bishop Coadjutor who shall have the right of succession. ~~The consent of a majority of the Bishops exercising jurisdiction and of the several Standing Committees must be obtained.~~ The election will be held in accordance with *Canon III.1.1* and this *Canon III.11.9(a)*.

Explanation:

The amendment eliminates provisions that will be covered by amendments to Canon III.11.1.

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**Resolution A161: Amend Canon III.11.9(b)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11.9(b) is hereby amended to read as follows:

(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) (2)(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.

~~(4)~~ (3) The tenure of office of a Bishop Suffragan shall not be determined by the tenure of office of the Bishop Diocesan.

~~(5)~~ (4) 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 eliminates provisions that will be covered by amendments to Canon III.11.1 and renumbers Section 9(b).

\*\*\*

**Resolution A162: Amend Canons III.II.9(c)(1) and III.11.9(c)(4)**

Resolved, the House of \_\_\_\_\_ concurring, That Canons III.11.9(c)(1) and III.11.9(c)(4) are hereby amended to read as follows:

(c) Missionary Bishops

(1) The election of a person to be a Bishop in a Missionary Diocese shall be held in accordance with the procedures set forth in the Constitution and ~~Canons of this Church~~. *Canon III.11 Sections 1-8, this Canon III.11. 9(c) and Canon III.12.6.*

(4) When a Diocese, ~~entitled to the choice of a Bishop, shall elect~~ *elects a Missionary Bishop as its Bishop Diocesan, or as its Bishop Coadjutor, or as a Bishop Suffragan, or as an Assistant Bishop, Bishop;*

~~a Missionary Bishop of this Church~~, the Standing Committee of the Diocese electing shall give duly certified evidence of the election to every Bishop of this Church having jurisdiction, and to the Standing Committee of every Diocese. On receiving notice of the concurrence of a majority of such Bishops and of the Standing Committees in the election, and their express consent thereto, the Standing Committee of the Diocese electing shall transmit notice thereof to the Ecclesiastical Authority of every Diocese within the United States. This notice shall state what Bishops and which Standing Committees have consented to the election. On receiving this notice, the Presiding Bishop shall certify to the Secretary of the House of Bishops the altered status and style of the Bishop so elected. The Standing Committee of such Diocese shall transmit to every Congregation thereof, to be publicly read therein, a notice of the election thus completed, and also cause public notice thereof to be given in such other way as they may think proper.

Explanation:

The amendment to Canon III.11.9(c)(1) clarifies the processes for election a Missionary Bishop, including the need to comply with the consent and missional review process set forth in Canon III.1.1. The amendment to Canon III.11.9(c)(4) clarifies that language of the Canon and provides that a Missionary Bishop may be elected as an Assistant Bishop.

\*\*\*

**Resolution A163: Amend Canon III.11 to add Canon III.11.10**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.11 is hereby amended to add Sec. 10 to read as follows:

*Sec. 10. Bishops who exercise or have jurisdiction are those who exercise ecclesiastical authority in a diocese or other jurisdiction of this Church.*

Explanation:

This Canon mirrors the proposed amendment to Article I of the Constitution clarifying what it means to exercise or have jurisdiction. It is presented at this time as an amendment to the Canons to provide guidance before a second reading of the amendment to the Constitution can be voted upon. Upon the approval of a second reading of the proposed amendment to Article I, Canon III.11.10 could be deleted.

\*\*\*

**Resolution A164: Amend Canon III.12.2**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.12.2 is hereby amended to read as follows:

Sec. 2. Continuing Education

The House of Bishops shall require and provide for the continuing education of Bishops. ~~and shall keep a record of such education.~~ *Each Bishop shall report all continuing education taken during the calendar year to the Secretary of the House of Bishops, who shall keep a record of the continuing education taken by Bishops.*

Explanation:

The amendment adds a reporting requirement to the continuing education requirement.

\*\*\*

**Resolution A165: Amend Canon III.12.3 to add Section 3(f)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.12.3 is hereby amended to add Section 3(f) to read as follows:

*(f) A resigned Bishop who may be appointed by the Ecclesiastical Authority to serve as a Supply Bishop to perform occasional episcopal acts or officiate by preaching, teaching, ministering the Sacraments, or holding occasional public services in the Diocese.*

Explanation:

The amendment allows a resigned Bishop to perform occasional episcopal or other services by appointment of the Ecclesiastical Authority of the Diocese.

\*\*\*

**Resolution A166: Amend Canon III.12.4(c) and add Canon III.12.4(d)**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.12.4(c) is hereby amended to read as follows and Canon III.12.4(d) is added to read as follows:

Section 4. Residency; *Vacancy in the Episcopate*

(c) A Bishop Diocesan, whenever leaving the Diocese for six consecutive months or more, shall authorize in writing, under hand and seal, the Bishop Coadjutor, the Bishop Suffragan if the Constitution and Canons of the Diocese so provide, or, should there be none, the Standing Committee of the Diocese, to act as the Ecclesiastical Authority thereof during the absence. The Bishop Coadjutor, or the Bishop Suffragan if the Constitution and Canons of the Diocese so provide, or, should there be none, the Standing Committee may at any time ~~become~~ *serve as the Ecclesiastical Authority upon the*

written request of the Bishop and continue to act as such until the request is revoked by the Bishop Diocesan in writing.

*(d) A vacancy in the episcopate shall be deemed to exist on the occurrence of any of the following: (i) the death, resignation, deposition or removal of the Bishop exercising jurisdiction, or (ii) the declaration by the Presiding Bishop or by resolution of the Standing Committee of the Diocese that the Bishop has been declared of unsound mind by an order of court or certified by at least two licensed medical doctors, psychologists or psychiatrists who have examined the case.*

Explanation:

The amendment clarifies when a vacancy in the episcopate occurs.

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**Resolution A167: Amend Canon III.12.5**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.12.5 is hereby amended to read as follows:

Sec. 5. Assistant Bishops

*(a) When a Diocese, in the opinion of its Bishop Diocesan, requires additional episcopal services, the Bishop Diocesan may, with the consent of the Standing Committee of the Diocese, ask the Convention of the Diocese to approve the creation of the position of Assistant Bishop and to ~~authorize the Bishop to appoint a Bishop for the position~~ call for an election for the position. If the Convention approves the creation of the position, the Bishop Diocesan may, with the consent of the Standing Committee of the Diocese ~~under such conditions as the Bishop may determine~~ call for the election for the position, to be held pursuant to the process set forth in Canon III.11. A Diocese shall not have more than three Assistant Bishops serving the Diocese.*

*(b) An Assistant Bishop may be ~~appointed~~ elected from among the following:*

*(1) Duly ordered Priests of this Church, or Bishops Diocesan, Bishops Coadjutor, or Bishops Suffragan, who under the Constitution and Canons of this Church would be eligible for election in that Diocese; provided that ~~at the time of accepting any such appointment upon election~~ a Bishop Diocesan, Bishop Coadjutor or Bishop Suffragan shall resign that office;*

*(2) Bishops of this Church whose tenure as an Assistant Bishop of a Diocese has ended or who, having resigned their previous responsibilities other than those who have attained the age of seventy-two, are qualified to perform episcopal acts in this Church; and*

*~~(3) (b) Persons who are Bishops of other Provinces of the Anglican Communion, in good standing therein, may be nominated for election as Assistant Bishop if they: Bishops of a Church in communion with this Church, in good standing therein, if they:~~*

- (i) have previously resigned their former responsibilities;
- (ii) have received approval, by a competent authority within the Church of their ordination ~~of their appointment to the position of Assistant Bishop as a Bishop of that Church;~~
- (iii) have exhibited satisfactory evidence of moral and godly character and having met theological requirements;
- (iv) have promised in a writing submitted to the Bishop *Diocesan* ~~making the appointment~~ to submit in all things to the Doctrine, Discipline and Worship of this Church;
- (v) have submitted to and satisfactorily passed a thorough examination covering their medical, psychological and psychiatric condition by recognized and licensed professionals appointed by the Ecclesiastical Authority of the Diocese with the approval of the Presiding Bishop. The forms for medical, psychological and psychiatric reports prepared by The Church Pension Fund shall be used for these purposes.
- (vi) *have undergone background screening and, if feasible, background checks as provided in Canon III.11x [per Section IV.C.4 of this Report].*
- (vii) *have been examined by the Bishop Diocesan and at least one other Bishop as to knowledge of this Church, its worship and governance:*
  - (1) *Church History: the history of the Anglican Communion and the Episcopal Church.*
  - (2) *Doctrine: the Church's teaching as set forth in the Creeds and in An Outline of the Faith, commonly called the Catechism.*
  - (3) *Liturgics: the principles and history of Anglican worship; the contents of the Book of Common Prayer.*
  - (4) *Practical Theology:*
    - (i) *The office and work of a Deacon and Priest in this Church.*
    - (ii) *The conduct of public worship.*
    - (iii) *The Constitution and Canons of the Episcopal Church and of the Diocese in which the applicant is resident.*

(iv) *The use of voice in reading and speaking.*

(5) *The points of Doctrine, Discipline, Polity, and Worship in which the Church from which the applicant has come differ from this Church. This portion of the examinations shall be conducted, in part at least, by written questions and answers, and the replies kept on file for at least three years.*

(i) *have received the following training:*

(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.*

(ii) *have served in The Episcopal Church for a period of two years, received the consent of a majority of the Bishops exercising jurisdiction and a majority of the Standing Committees, and been received into The Episcopal Church as a Bishop.*

*A Bishop of another Province of the Anglican Communion does not become a Bishop of this Church solely by virtue of being elected an Assistant Bishop of a Diocese.*

~~(4) Before the appointment of a Bishop who is not otherwise a member of the House of Bishops a Bishop of this Church as an Assistant Bishop under the provisions of Secs. 5(b)(2) or 5(b)(3) of this Canon, the consent of a majority of the Standing Committees of the Dioceses and the consent of the House of Bishops or, if the appointment is to be made more than three months prior to a meeting of the House of Bishops, the consent of a majority of Bishops exercising jurisdiction must be obtained within sixty days of receipt of notice from the Standing Committee of the Diocese seeking the appointment of the Assistant Bishop. [Covered in Canon III.11.1 amendments]~~

~~(c) Before an Assistant Bishop so appointed begins service in this position, the Bishop of the Diocese shall give certified evidence of the appointment to the Secretary of the House of Bishops and shall transmit notice of the appointment to the Presiding Bishop and to the Ecclesiastical Authority of every Diocese. [Task Force note: covered in III.11]~~

(d) *An Assistant Bishop shall serve at the discretion, and under the control and direction of, the Bishop Diocesan.*



(e) No person may serve as an Assistant Bishop of a Diocese beyond the termination of the jurisdiction of the ~~appointing~~ Bishop Diocesan of the Diocese or after attaining the age of seventy-two years.

Explanation:

These amendments provide for the election of Assistant Bishops instead of having them be appointed by the Bishop Diocesan. They also clarify the requirements for bishops who members of Provinces of the Anglican Communion. The requirements are parallel to the requirements for priests from churches in communion with The Episcopal Church.

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**Resolution A168: Amend Canon III.12.9(a)**

Resolved, the House of \_\_\_\_\_ concurring, That Section 9(a) of Canon III.12.9 is hereby amended to read as follows:

- (a) Each Bishop, upon attaining the age of seventy-two years, shall resign as required by Article II, Sec. 9 of the Constitution. The resignation shall be sent to the Presiding Bishop, who shall immediately communicate it to every Bishop of this Church exercising jurisdiction and shall declare the resignation accepted, effective at a designated date not later than three months from the date the resignation was tendered. *No Bishop having reached the age of seventy-two years shall exercise jurisdiction.*

Explanation:

The amendment clarifies that Bishops are not only required to resign jurisdiction when they reach the age of 72 as provided in Article II.9 but are also not authorized to exercise jurisdiction after reaching the age of seventy-two in a provisional or other capacity.

\*\*\*

**Resolution A169: Amend Canon III.12.9(l) and Canon III.12.9(m)**

Resolved, the House of \_\_\_\_\_ concurring, That Sections 9(l) and 9(m) of Canon III.12.9 are hereby amended to read as follows:

- (l) A resigned Bishop may, ~~with the approval of the Bishop of the Diocese in which the resigned Bishop resides,~~ accept an appointment by the Bishop Diocesan to any position created under the authority of the Diocesan Convention, ~~including that of Assistant Bishop~~ for which an appointment is permitted and may, at the same time, occupy a pastoral charge.

(m) A resigned Bishop over the age of seventy-two may accept an appointment by a Bishop Diocesan, including that of Supply Bishop, for a term not to exceed twelve months, and this term may be renewed.

Explanation:

The amendment to Section 9(l) clarifies that Assistant Bishops are no longer appointed and that the Bishop Diocesan may appoint resigned Bishops to positions for which appointments are permitted. The amendment to Section 9(m) clarifies that a resigned bishop over the age of seventy-two may act as a Supply Bishop, providing temporary coverage when the Bishop of the Diocese is temporarily unavailable, such as during a vacation or sabbatical or providing other episcopal or sacramental services on a temporary or part-time basis.

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**Resolution A170: Amend Canon III.12.12(a)**

Resolved, the House of \_\_\_\_\_ concurring, That Section 12(a) of Canon III.12.12 is hereby amended to read as follows:

Sec. 12. Dissolution of the Pastoral Relation between a Bishop and Diocese

(a) If for any urgent reason a Bishop or two-thirds majority of all the members of the Standing Committee or a two-thirds majority vote of Diocesan Convention, based on a vote in a duly-called meeting, desires a dissolution of the pastoral relationship, and the parties cannot agree, any party may give notice in writing to the Presiding Bishop with a copy available to the Bishop *or and also to the Standing Committee if the decision comes from the Diocesan Convention*. Such notice shall include sufficient information to inform the Presiding Bishop and all parties involved of the nature, causes, and specifics requiring the dissolution of the pastoral relationship. If the parties have participated in mediation or consultation processes, a separate report from the mediator or consultant will be submitted to the Presiding Bishop with copies available to the Bishop and Standing Committee.

Explanation:

The amendment to Section 12(a) clarifies that the Bishop always gets a copy of the notice and the Standing Committee gets a copy if the decision comes from the Diocesan Convention.

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**Resolution A171: Amend Canon III.13**

Resolved, the House of \_\_\_\_\_ concurring, That Canon III.13 is hereby amended to read as follows:

CANON 13: Of Dioceses without Bishops

Sec. 1(a). *Upon the death, resignation, deposition, or removal of a Bishop Diocesan, a Bishop Suffragan or Bishop Coadjutor of the Diocese may serve as the Bishop Diocesan Pro Tempore in accordance with Article II of the Constitution and the Constitution and Canons of the Diocese. If a Bishop Suffragan or Bishop Coadjutor of the Diocese is not serving as its Bishop Diocesan Pro Tempore, a ~~A~~Diocese without a Bishop Diocesan may, by an act of its Convention, and in consultation with the Presiding Bishop, be placed under the provisional charge and authority of a Bishop of this Church of another Diocese or of a resigned Bishop of this Church, who shall by that act be authorized to serve as Bishop Diocesan Pro Tempore and to exercise jurisdiction and carry out all the duties and offices of the Bishop Diocesan of the Diocese until a Bishop Diocesan is elected and ordained for that Diocese or until the act of the Convention is revoked.*

~~Sec. 3.~~ (b) A Diocese, while under the ~~provisional~~ charge of a Bishop Diocesan Pro Tempore, shall not invite any other Bishop to visit and exercise episcopal acts or authority without the consent of the Bishop Diocesan Pro Tempore ~~in charge~~.

Sec. 2. Any Bishop may, on the invitation of the Convention or of the Standing Committee of any Diocese where there is no Bishop, visit and exercise episcopal offices, *but shall not exercise jurisdiction*, in that Diocese or any part of it *as a Bishop Provisional for the Diocese*. This invitation ~~may~~ shall include a letter of agreement, shall be for a stated period and may be revoked at any time. *A Diocese may have more than one Bishop Provisional serving the Diocese, and in such case the respective duties and responsibilities of the Bishops Provisional shall be set forth in their letters of agreement.*

Explanation:

The amendment to Section 1 allows a diocese to have its Bishop Suffragan, Bishop Coadjutor or another Bishop serve as Bishop Diocesan Pro Tempore and exercise jurisdiction if the Bishop Diocesan dies or resigns. Some dioceses have had the Suffragan or other Bishop act in this capacity and this amendment provides a Canonical process for these options. Current Section 3 is moved to become Section 1(b), as amended. The amendment to Section 2 provides for a Bishop Provisional to serve for a stated period of time pursuant to a letter of agreement without exercising jurisdiction. Dioceses, especially ones covering a large geographic area, have the option to call more than one Bishop Provisional to ensure that the entire diocese is properly covered or to have one Bishop Provisional cover certain duties with another covers other duties.

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## Proposed Resolutions

In the digital version of this document the resolution titles below are hyperlinked to the resolution text in the Summary of Work section of this report.

[Resolution A138: Transmission of Demographic Data from Episcopal Elections](#)

[Resolution A139: Analysis of Data from Episcopal Elections](#)

[Resolution A140: Diversity Guidelines for Episcopal Elections](#)

[Resolution A141: Training of Transition Consultants](#)

[Resolution A142: Adoption of Episcopal Election Procedures by Dioceses](#)

[Resolution A143: Study Career Development of Female and Minority Clergy](#)

[Resolution A144: Diocesan Missional Review](#)

[Resolution A145: Urging Adoption of Local Canons Relating to Episcopal Elections](#)

[Resolution A146: Revisions to The Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition](#)

[Resolution A147: Pilot Board for Episcopal Transitions](#)

[Resolution A148: Amend Canons III.11.1, III.11.3 and III.11.9\(c\)](#)

[Resolution A149: Reorganize the Board of Directors of The College for Bishops](#)

[Resolution A150: Amend Article I.2 of the Constitution](#)

[Resolution A151: Amend Article II.4-8 of the Constitution](#)

[Resolution A152: Amend Article III of the Constitution](#)

[Resolution A153: Amend Article IV of the Constitution](#)

[Resolution A154: Amend Canon I.13.3\(a\)](#)

[Resolution A155: Amend Canon III.5\(c\)](#)

[Resolution A156: Amend Canon III.11.1](#)

[Resolution A157: Amend Canon III.11.2](#)

[Resolution A158: Amend Canon III.11.3\(a\)\(1\)](#)

[Resolution A159: Amend Canon III.11.3\(a\) \(third paragraph\) and Canon III.11.4](#)

[Resolution A160: Amend Canon III.11.9\(a\)](#)

**Resolution A161: Amend Canon III.11.9(b)**

**Resolution A162: Amend Canons III.II.9(c)(1) and III.11.9(c)(4)**

**Resolution A163: Amend Canon III.11 to add Canon III.11.10**

**Resolution A164: Amend Canon III.12.2**

**Resolution A165: Amend Canon III.12.3 to add Section 3(f)**

**Resolution A166: Amend Canon III.12.4(c) and add Canon III.12.4(d)**

**Resolution A167: Amend Canon III.12.5**

**Resolution A168: Amend Canon III.12.9(a)**

**Resolution A169: Amend Canon III.12.9(l) and Canon III.12.9(m)**

**Resolution A170: Amend Canon III.12.12(a)**

**Resolution A171: Amend Canon III.13**

## Budget

For the 2019-2021 Triennial Budget, the Task Force requests a total appropriation of \$450,000.00, to be allocated as follows:

For the update of the Episcopal Elections Manual: \$100,000.00. Includes data-gathering, training videos, and educational materials.

For training of Episcopal Transition and Missional Review Consultants: \$75,000.00

For Demographic Study and Research: \$30,000.00. Includes obtaining and analyzing demographic information from dioceses, the Church Pension Group, the House of Bishops, Standing Committees and other Diocesan Committees to research episcopal elections and analyze diversity issues in Church leadership. The Task Force envisions that a professional with experience in data analysis would be engaged for this work.

For Episcopal Discernment in Underrepresented Groups (including website): \$95,000.00. The Task Force envisions two gatherings per year, initially for clergy from underrepresented demographics. The amount includes scholarships.

For Missional Review Grants for Dioceses: \$50,000.00. Financial assistance for dioceses undergoing missional reviews prior to an episcopal election process.

For the pilot Board for Episcopal Transitions: \$100,000.00. For organizational costs and two meetings per year. As presented in Section (IV.C.3) of this report, this would fund the work overseeing the revising of discernment resources, the recruiting and training of Transition Consultants, the gathering and analyzing of demographic data, developing guidelines for references, background, and medical screening, and aiding with resources for missional reviews.

## Continuance Recommendation

The Task Force is not recommending that its existence be continued into the next triennium.

## Supplementary Materials

### A. CHART OF TITLES AND TYPES OF BISHOPS

#### Types of Bishops

Type of Bishop	Exercises Jurisdiction?	Exercise Jurisdiction if Diocesan is out Temporarily?	Exercise Jurisdiction if Diocesan is out Permanently?	Need Consent of Standing Committees and HOB to Hold Election?	Need Consent of Standing Committees and HOB to the Person Elected?	Missional Review Required?
<b>Bishop Diocesan</b>	Yes	N/A	N/A	Yes	Yes	Yes
<b>Bishop Coadjutor</b>	No	Yes, as <i>Pro Tempore</i>	Yes, as <i>Pro Tempore</i>	Yes	Yes	Yes
<b>Bishop Suffragan</b> of a Diocese	No	Yes, as <i>Pro Tempore</i>	Yes, as <i>Pro Tempore</i>	Yes	Yes	Yes
<b>Bishop Suffragan</b> Art II.7 - HOB elects	No	N/A	N/A	HOB elects	HOB elects	No
<b>Missionary Bishop</b> Canon III.11.9	No	N/A	N/A	Yes	Yes	Yes
<b>Bishop of Area Mission</b> Canon I.11 assigned by HOB	Yes	N/A	N/A	HOB assigns	HOB assigns	No
<b>Bishop - Foreign Lands</b> Art III - elected by HOB	No	N/A	N/A	HOB elects	HOB elects	No
<b>Assistant Bishop</b> tenure ends when Bishop Diocesan leaves Canon III.12.5	No	No	No	Yes	Yes	Yes
<b>Bishop Diocesan Pro Tempore</b> Canon III.13.1(a) Coadjutor, Suffragan, resigned bishop, or bishop from another diocese	Yes	Yes	Yes	No	No	No
<b>Supply Bishop</b> does occasional work Canon III.12.3(f)	No	No	No	N/A	N/A	N/A
<b>Bishop Provisional</b> temporary coverage pursuant to the terms of a Letter of Agreement if no Bishop Diocesan Canon III.13.2	No	No	No	N/A	N/A	N/A

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