

# TASK FORCE TO ASSIST THE OFFICE OF PASTORAL DEVELOPMENT

## Membership

|  |                           |      |
|--|---------------------------|------|
| Canon Jill Mathis, <i>Chair</i>                | Pennsylvania, III         | 2021 |
| The Rt. Rev. Audrey Scanlan, <i>Vice-Chair</i> | Central Pennsylvania, III | 2021 |
| Mr. Robert Ambrogi, <i>Secretary</i>           | New Hampshire, I          | 2021 |
| Canon Lynn Bates                               | Vermont, I                | 2021 |
| The Rev. Canon Joseph Chambers                 | Texas, VII                | 2021 |
| The Rev. Percy Grant                           | Ohio, V                   | 2021 |
| Prof. Lawrence Hitt, II                        | Colorado, VI              | 2021 |
| The Rt. Rev. Mark Hollingsworth                | Ohio, V                   | 2021 |
| The Rev. Canon Gregory Jacobs                  | Newark, II                | 2021 |
| The Rt. Rev. Chilton Knudsen                   | Maryland, III             | 2021 |
| The Rt. Rev. Brian Seage                       | Mississippi, IV           | 2021 |
| The Rev. Canon Nora Smith                      | New York, II              | 2021 |
| The Very Rev. Dr. Steven Thomason              | Olympia, VIII             | 2021 |
| Ms. Mary T. Yeiser                             | Lexington, IV             | 2021 |
| The Most Rev. Michael Curry, <i>Ex Officio</i> | North Carolina, IV        |      |
| The Rev. Gay Clark Jennings, <i>Ex Officio</i> | Ohio, V                   |      |

## Changes in Membership

The Rev. Canon Rafael Zorilla, 2018

## Acknowledgements

Alexandra (Sasha) Killewald, PhD., Professor of Sociology, Harvard University

## Mandate

### Resolutions 2018-A147 & 2018-A189

#### 2018-A147 Pilot Board for Episcopal Transitions

*Resolved*, That a Task Force to assist the Office of Pastoral Development be appointed for an initial period of three years commencing at the adjournment of the 79th General Convention; and be it further

*Resolved*, That the Task Force be composed of up to twelve persons appointed jointly by the Presiding Bishop and President of the House of Deputies in consultation with the Bishop for Pastoral Development. Membership of the Task Force will represent the diversity of all the baptized within the Church and will consider particular gifts and experiences that will be beneficial to the work of the Task Force; and be it further

*Resolved*, That the Task Force will concentrate its work on assisting the Office of Pastoral Development in:

revising existing resources and creating new resources to assist dioceses in the discernment, nomination, search, election, and transition processes for episcopal transitions;

making available through open-source and digital networks, the variety of materials for use by individuals, dioceses, and consultants in the discernment, nomination, search, election and transition processes for episcopal elections;

establishing a process and developing resources by which individuals may seek support in discerning a possible call to the episcopate;

gathering and analyzing data regarding diversity in episcopal transitions, developing processes and resources to encourage diversity in the episcopate;

recruiting, training and evaluating Transition Consultants and missional review consultants;

encouraging electing dioceses to contract for the services of a Transition Consultant throughout the episcopal search and election process;

formalizing and expanding recruitment and training for Transition Consultants;

standardizing and monitoring the contracts used by Transition Consultants with electing dioceses;

establishing a process to review the performance of each Transition Consultant, including the use of individual performance records for each Transition Consultant and to provide for their collection and analysis.

establishing a process for electing dioceses to provide individual performance evaluations based upon objective standards for the Transition Consultant(s) who served the electing diocese from which the work of each Transition Consultant can be evaluated.

providing ways in which one or more Transition Consultants can participate in the maintenance of the Raising Up of Episcopal Leadership - A Manual for Dioceses in Transition and evaluation of the effectiveness of the episcopal election process.

enhancing guidelines for reference, background, medical, and psychological screening of persons considered for nomination for episcopal elections and guidelines for the dissemination, evaluation, and record keeping of the screening information gathered; and be it further

*Resolved*, That the Bishop for Pastoral Development report semi-annually to the Executive Council and to the next General Convention; and be it further

*Resolved*, That the amount of \$250,000 be appropriated for the organization and initial resources of the Task Force, to include two meetings per year.

**2018-A189 Create Task Force to Develop Process for Substance Abuse Screening**

*Resolved*, the House of Deputies concurring, That a Task Force or similar body be formed to develop a standardized process of screening persons applying for ordination with respect to their history of and experience with alcohol and substance abuse; and be it further

*Resolved*, that the Task Force identify best practices for dioceses to follow in evaluating issues of alcohol and substance abuse, including training for Standing Committees, Commissions on Ministry and others involved in the ordination process, as well as training for persons in the ordination process; and be it further

*Resolved*, That the Task Force prepare a report for the 80th General Convention giving recommendations with respect to alcohol and substance abuse for (1) screening processes for dioceses to employ in the ordination process, including how to best evaluate applicants with a history of addictions who are now living in recovery (2) training for Standing Committees, Commissions on Ministry and others involved in the ordination process, including diocesan staff, and (3) training and other appropriate recommendations for persons in the ordination process; and be it further

*Resolved*, That the Task Force be composed of three Bishops appointed by the Presiding Bishop, at least two of whom have experience in dealing with clergy with a history of alcohol or substance abuse, and six priests, deacons or lay persons appointed by the President of the House of Deputies, at least 3 of whom have relevant experience in the evaluation and treatment of persons with a history of alcohol or substance abuse and at least one of whom serves as a diocesan Transition Officer who has experience in dealing with clergy who have a history of alcohol or substance abuse. At least three members of this Task Force should be persons living in recovery; and be it further

*Resolved*, That the Task Force also examine a process for identifying other forms of addiction and their potential impact on ministry; and be it further

*Resolved*, That the General Convention request the Joint Standing Commission on Program, Budget and Finance allocate \$25,000 to the budget to facilitate the work of the Task Force.

## Summary of Work

### THEOLOGICAL AND ECCLESIASTICAL CONTEXT

The principal challenge in providing denominational support to dioceses in episcopal transitions may well be one of polity. While the wider church both has experience and wisdom to offer and has a substantial stake in the outcome, the responsibility for determining and carrying out the process, and ultimately making the choice of bishop, falls to the diocese in transition. Achieving a companionship between diocese and wider church that accommodates the autonomy of the former, the reasonable expectations of the latter, and the accountability of both, is essential to the health and vitality of the church. The burden of attending to that relationship falls predominantly on the Office of Pastoral Development and the person who leads it, the Bishop for the Office of Pastoral Development.

The Office of Pastoral Development additionally oversees the implementation of disciplinary canons and processes when bishops are respondents in Title IV proceedings. As with episcopal transitions, this involves guiding both bishops and the dioceses they serve along often complex and inevitably painful paths to resolution and, the church hopes, recovery. The relationships between and among complainants, respondents, parishes, dioceses, the denomination itself, and the wider community all fall within the church's vocation to provide pastoral attention, as well as accountability, care, and healing, wherever possible.

Finally, the Presiding Bishop's responsibility to provide pastoral care to bishops, their spouses, and their families is supported in large part by the Office of Pastoral Development.

Healthy episcopal ministry is the goal and responsibility of all in the church, the ordained and laity alike. The structures by which an episcopal vocation is discerned, identified, supported, and held accountable must likewise involve the whole body of Christ. The Office of Pastoral Development plays an important role in inviting, encouraging, and supporting that corporate responsibility.

In understanding the collaborative dynamic intended by our theology and ecclesiology, it may be helpful to distinguish between authority and responsibility. Our polity, how we agree to organize and govern ourselves as a body, presupposes that baptismal authority is the only human authority in the church, and that all members, by virtue of their baptism, are recipients thereof in equal amount. No one has either more or less authority as a result of elected position, holy orders, gender, race, orientation, or any other defining attribute (save age, until turning 16). As the baptized, we are each equally endowed with authority.

By processes defined in the general canon, diocesan canons, and parochial by-laws, we invest some of our baptismal authority in one another for specific duties by electing vestry members and wardens; delegates and deputies to diocesan and general conventions, respectively; committee and

commission members in congregations, dioceses, and the wider church; and by ordaining deacons, priests, and bishops. And in the mystery of God, the baptismal authority we invest in one another is received not as authority, but as responsibility. It is received not as power over, but as accountability for.

In this way, we all engage in a continuing dynamic of surrendering some of our individual authority to others, and taking on specific responsibility for and to the whole. This is for us, as Christians and Episcopalians, a spiritual discipline of letting go of self-will and taking on responsibility for the body of Christ. It serves as calisthenics for surrendering ourselves to God and making Jesus's way our way.

The Task Force to Assist the Office of Pastoral Development has been charged with exploring, understanding, and articulating the scope of episcopal transitions, elections, and service. It has endeavored to provide practical resources for dioceses in transition and individuals discerning a vocation to the episcopate. As well, it has undertaken to investigate potential vehicles for assisting the Bishop for the Office of Pastoral Development in the challenging pastoral and disciplinary responsibilities of that Office. Our work follows upon that of previous interim bodies, most notably the Task Force on the Episcopacy and the Commission on Impairment and Leadership.

The efficacy and fidelity of our common life as Christians and Episcopalians is dependent upon trust – our trust of one another and our trust in God. It is clear to this Task Force that trust is foundational to the effective discernment and identification of leaders in the church, lay and ordained, and to the ministries that we expect of them. While that trust cannot be legislated, it can be anticipated by canon, inspired by practice, and supported by the structures and best practices of our church. Ultimately, its practical realization is relational, dependent always on interactions between individuals and defined groups, Christians who are open to the gifts one another brings and willing both to invest authority in each other and to receive responsibility in return.

It is that trust and interdependence we have sought in the structures and resources we have explored and developed in our work as a task force and which we recognize as essential to raising up and sustaining faithful and vibrant leadership in the church.

*-Bishop Mark Hollingsworth*

## **SUMMARY OF WORK**

Because of the work described in the final bullet point of 2018-A147, “enhancing guidelines for reference, background, medical, and psychological screening, etc...”, it was determined that the work of this Task Force would also include Resolution 2018-A189 Create Task Force to Develop Process for Substance Abuse Screening. In addition, the work mandated by the fourth bullet point, suggested that this Task Force should also concern itself with addressing 2018-A138 Transmission of Demographic Data from Episcopal Elections and 2018-A145 Urging Adoption of Local Canons Relating to Episcopal Elections.

During our first meeting, in November of 2018, it was determined that the role of this Task Force would be to work with the Bishop of the Office of Pastoral Development, the Rt. Rev. Todd Ousley, to help identify areas that need improvement and revision, either directly, or by pointing to outside expertise. The goal would be to condense and update materials (i.e., the current Manual for Episcopal Elections was last updated in 2012) to make them more accessible to the Church and easier to ‘digest’ and to allow recommended best practices to be ‘customizable’ to the needs of each diocese in a bishop search, and to develop a web-based portal so that search materials would be accessible to a broader range of users.

We determined that the work specified by the bullet points in 2018-A147, and the whole of resolutions 2018-A189 and 2018-A138 as well as 2018-A145 and 2018-A146 would best be addressed by breaking them up among working groups. Working with the Bishop Ousley of the Office of Pastoral Development we prioritized our work as follows:

- Best Practices Database: updated and condensed
- Recruit, train and re-tool transition consultants and their materials
- Enhance guidelines for reference checking, medical and psychological resources
- Develop a web portal that is accessible to the diocesan leaders

### **BEST PRACTICES DATABASE UPDATED AND CONDENSED**

The episcopal search consultants utilized by most dioceses holding elections for bishops have, over the years, collected many documents relating to all aspects of an episcopal search and election. These documents are in an electronic database and are in need of review, organization, culling, and updating.

During the course of the triennium a work group reviewed approximately 600 documents in the online database. Each member of the group reviewed approximately 150 documents and identified documents which were particularly valuable, somewhat helpful, duplicative or no longer reflected “best practices.”

The multiple resources in the database were indexed as best as possible. The work group concluded that search consultants also needed to be involved to move this particular task further along, and so this work will continue. Bishop Ousley is identifying consultants to work with the group, but the pandemic presented logistical challenges and work with the consultants remains to be done.

The goal is to make the best of the materials available publicly to search and nominating committees as well as Standing Committees involved in episcopal searches.

### **RECRUIT, TRAIN AND RE-TOOL TRANSITION CONSULTANTS AND THEIR MATERIALS**

In response to the issues identified in Resolution 2018-A147 concerning the recruiting, selection, training, and evaluation of “Transition Consultants and mission review consultants,” a work group of the Task Force held a series of interviews and conversations with the Bishop Ousley of the Office of Pastoral Development as well as present and past transition consultants experienced in episcopal elections. The focus of our work was to initially gain an understanding as well as some insights into the present consulting process and then formulate a series of recommendations for future implementation by the Office of Pastoral Development. It should be noted that our recommendations were shared with the Bishop for the Office of Pastoral Development and received his full endorsement with the expectation that many of them will be implemented before the end of this triennium.

#### **Findings**

- The current process for identifying, selecting and training consultants in episcopal elections has been in place without significant modification for more than 10 years.
- The Bishop for the Office of Pastoral Development, largely alone, identifies, recruits, selects, assigns, trains and monitors the work of the episcopal search consultants.
- Potential consultants are routinely identified largely by self-selection/expression of interest or recommendation by others. Many were formerly diocesan transition staff or had similar experience as parish search consultants. There are currently between 8-10 active search consultants.
- There is no formal application process for consultants, nor does a specific job description exist for consultants.
- Periodic training of consultants is typically conducted by the Bishop for the Office of Pastoral Development and one or two experienced consultants. No regular schedule for formal training of consultants or continuing education appears to have been followed. The last comprehensive training was held in 2016.

- Present consultants are convened by teleconference on a quarterly basis by one of the consultants for 90-minute sessions. Topics generally include exploring common problems/challenges and sharing best practices/search materials.
- Principal training materials include “The Raising Up of Episcopal Leadership: A Manual for Dioceses in Transition” (2007, last revised 2012) and accumulated search materials created by consultants, presently located in common online database accessible to consultants. Many of these materials are considerably out of date and must be reviewed, revised, and supplemented by relevant and user-friendly search resources.
- There is no common process or materials for evaluating the work of consultants. Some have created an evaluation form to be completed by the episcopal search committee.
- There is no present systematic evaluation of search consultants by the Office of Pastoral Development, nor a process for mandatory recertification of consultants.

We conclude that there should be a commitment and strategy by the Office of Pastoral Development to reset, reimagine, and repurpose the episcopal search consultant process in order to effectively address certain deficiencies in the present program.

## **Recommendations**

### *Identification, Recruitment, and Selection of Consultants*

- The task of identifying, recruiting, selecting, training, monitoring and evaluating episcopal search consultants is critical to the integrity and effectiveness of the episcopal transition process. Standing Committees, bishop search/transition committees, current diocesan bishops and staff, and bishop applicants themselves must be assured that well-qualified and purposely trained consultants are being made available to them through the Office of Pastoral Development. To that end, we recommend that the Office of Pastoral Development set a goal of selecting, training and certifying a pool of at least 15 qualified consultants by no later than the conclusion of this triennium (i.e., July 2021).
- As the work of recruiting, selecting, training and evaluating prospective consultants would benefit from the gifts and experience of persons with particular knowledge, objectivity and insight in these areas, a council of advice should be created to assist the Bishop for the Office of Pastoral Development in carrying out these responsibilities.
- The council should consist of no more than 5 persons with collective expertise in human resources/organizational management, law, church polity, leadership discernment, transition ministry, and family systems/behavioral psychology. Clergy (bishop, priest, deacon), chancellor, and laypersons should be represented on the Council, with the goal of actively advising the Bishop for the Office of Pastoral Development at all stages (initially and

ongoing) in the re-imagining and implementation of a new recruiting, application, interview and selection process for consultants.

- In the interest of establishing an open, uniform, and unbiased process that will yield well-qualified applicants of suitable expertise and temperament, we recommend that all prospective consultants must engage in a formal application, interview and vetting process regardless of their current or former status as episcopal search consultants.
- Special attention should be given to the creation of a search consultant job description that speaks to the expertise, gifts, temperament and character, as well as the specific requirements of the position. A suggested job description may be found in the supplemental materials at the end of this report (JOB DESCRIPTION FOR EPISCOPAL SEARCH CONSULTANTS).
- We also encourage the Office of Pastoral Development to enlist and engage the services of persons and organizations that can assist in the identification and recruitment of persons in traditionally and presently underrepresented groups.
- In the course of its work, the council must also give consideration to the creation of standards and requirements for the certification and recertification of consultants. Input from consultant trainers would be beneficial to this process.

#### *Training of Search Consultants*

- In order to address issues concerning the content, adequacy, and frequency of training, the Office of Pastoral Development should give serious consideration to the creation of a consultant curriculum design and training advisory team.
- This team consisting of 5 or 6 persons would be tasked, in conversation with the Bishop for the Office of Pastoral Development, with the creation and implementation of a formal training curriculum for the search consultants. Members of the team should have collective demonstrated experience and knowledge in family systems, church polity, theology, consulting processes, coaching/mentoring dynamics, curriculum and design/implementation, consultant training, and evaluation of consultants.
- The team would be tasked with creating an initial training curriculum envisioned for a 3-day training session for consultants, to be conducted by the Bishop for the Office of Pastoral Development and trainers from the advisory team. The team would also take responsibility for designing training modules for future periodic training of consultants as well as the design of a process for ongoing evaluation of the effectiveness and requirements for consultant training, including the recertification of consultants.

- To underscore the significance and importance of consultant training, we recommend that some modest amount of the initial and continuing training expense be borne by the consultant-trainees themselves.
- Recognizing the necessity for providing consultants with the opportunity to meet collaboratively for purposes of mutual support, sharing resources, and identifying best practices, the quarterly meetings of consultants should be continued. We encourage the Bishop for the Office of Pastoral Development, members of the Council of Advice, and members of the curriculum/training team to participate in these sessions when appropriate.
- Our conversations have also informed us of the need for annual continuing education/training as well as creating a process for recertifying current consultants. We suggest an initial certification for consultants of no longer than 3 years with appropriate expectations/requirements for periodic continuing education and participation in quarterly consultants' meetings.

#### *Evaluation of Episcopal Search Consultants*

First let it be said that the reason for evaluation of the consultants is as an educational and coaching part of this overall process. Evaluation will identify what to emphasize in trainings, as well as the gifts and strengths that this consultant can share with the group. Evaluation gives voice to the participants and guidance to the ongoing process. An evaluation will be performed for each transition with appropriate feedback shared with the consultant.

For the most complete evaluation, it is important for people at the many different points of contact during the episcopal search process with which the consultant works to provide input. Thus, the President of the Standing Committee, Diocesan Bishop, Chair of the Search Committee, Applicants, Chair of the Transition Committee and the Bishop-Elect should be considered primary contacts during the evaluation process. Each of these persons should be invited to complete an evaluation at the conclusion the search process in which they were involved, in order to provide a fresh perspective on the consultant's work.

Given the number of participants likely to be involved, a 360 method of evaluation would offer the most comprehensive and fairest process. In a 360-evaluation process, both the consultant and the participants complete the same evaluation form. This allows the consultant to receive feedback from a number of sources, allowing for comparison with the consultant's own self-evaluation. The 360-evaluation model would offer the opportunity for the consultant to see him/herself as others see the consultant, providing guidance and insight from the experiences of participants in the search process.

At the completion of the consultation, each of the collected 360 evaluations would be collated by the Office of Pastoral Development. The consultant evaluations would be read by the Bishop of Pastoral Development as well as a member of the Bishop for the Office of Pastoral Development's

council of advice, and either an active or retired consultant, as well as the search consultant. At this point, reflection, education and coaching can take place in a way that should become normative to the system.

*Recommendations for Future Work*

- Identify a Pool of Certified Search Consultants. Recommend that the Office of Pastoral Development set a goal of selecting, training and certifying a pool of at least 15 qualified consultants by no later than the conclusion of this triennium.
- Council of Advice. A Council of Advice should be created to assist the Bishop for Pastoral Development in work of recruiting, selecting, training and evaluating prospective consultants. The Council of Advice with the advice and consent of the Presiding Bishop, should consist of no more than 5 persons with collective expertise in human resources/organizational management, law, church polity, leadership discernment, transition ministry, and family systems/behavioral psychology. Clergy (bishop, priest, deacon), chancellor, and laypersons should be represented on the Council, with the goal of actively advising the Bishop for Pastoral Development at all stages (initially and ongoing) in the re-imagining and implementation of a new recruiting, application, interview and selection process for consultants.
- Establish a formal application and review process for search consultants. In the interest of establishing an open, uniform, and unbiased process that will yield well-qualified candidates of suitable expertise and temperament, we recommend that all prospective consultants must engage in a formal application, interview and vetting process regardless of their current or former status as episcopal search consultants.
- Create Search Consultant Job Description. Special attention should be given to the creation of a search consultant job description that speaks to the expertise, gifts, temperament and character, as well as the specific requirements of the position as suggested by the job description found in the supplemental materials.
- Create Standards for Search Consultant Certification and Recertification.
- In the course of its work, the Council of Advice must also give consideration to the creation of standards and requirements for the certification and recertification of consultants.
- Identify a Consultant Curriculum Design and Training Advisory Team to address issues concerning the content, adequacy, and frequency of training. This team consisting of 5 or 6 persons would be tasked, in conversation with the Bishop for Pastoral Development, with the creation and implementation of a formal training curriculum for the search consultants.
- Create Search Consultant Evaluation Process to evaluate performance and effectiveness of the search consultant's work following a bishop search and election.

**DEVELOP TRAINING RESOURCES FOR STANDING COMMITTEES, COMMISSIONS ON MINISTRY, AND BISHOPS RE: ISSUES OF IMPAIRMENT**

A work group of the Task Force undertook to develop trainings materials regarding issues of impairment. This was accomplished after researching best practices from around the Church and in related areas. A list of Core Competencies was created along with a resource guide written by the Rev. Canon Nancy Van Dyke Platt, the Rev. Dr. David Moss, III and Elizabeth Platt Hamblin entitled *Addiction: Interview Questions for Ordination Aspirants*. The aforementioned resources provide basic understanding for clergy and lay leadership involved in discernment at all levels.

These Competencies may be found in the supplemental materials at the end of this report (CORE COMPETENCIES FOR CLERGY AND PASTORAL MINISTERS ADDRESSING ALCOHOL AND DRUG DEPENDENCE AND OTHER ADDICTIVE BEHAVIORS). They are presented as a specific guide to the core knowledge, skills and preconceptions which are essential to the ability of all diocesan transition leaders to exercise their responsibilities with regard to persons with substance use disorder and any other addictive behavior.

**ENHANCE GUIDELINES FOR REFERENCE CHECKING, MEDICAL AND PSYCHOLOGICAL RESOURCES, ETC. FOR EPISCOPAL ELECTIONS**

A work group spent considerable time focused on the last bullet point of 2018-A147:

*"... enhancing guidelines for reference, background, medical, and psychological screening of persons considered for nomination for episcopal elections and guidelines for the dissemination, evaluation, and record keeping of the screening information gathered."*

It specifically focused on screening performed during episcopal transitions. Although neither the work group nor the Task Force as a whole addressed it, the practices described in this section could be edited down to be appropriate for screening of candidates for the diaconal or priestly clerical orders as mandated in 2018-A189.

There is no recognized best practice or consistent approach across the Church in episcopal search processes regarding what information is gathered about potential nominees, who sees it, how it is evaluated, and how decisions are made about it.

The purpose of gathering any type of information during an episcopal election process is several fold. The primary purpose is to aid various groups in discerning who should, and who should not, be considered as potential nominees for bishop at various stages of the process. The primary purpose is to identify those persons who best fit the profile the diocese has developed as to what sort of person, gifts, and skills are needed in that diocese at that time. Another purpose is to determine if there are persons who, for a variety of reasons, should not be considered as potential nominees.

The Task Force proposes Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*, which states, in part:

(c) Prior to any person's name being placed in nomination for election as a Bishop in a diocese, whether by the nominating body or by petition, floor nomination or in any other way, the diocese shall have:

(1) conducted a thorough background check of each nominee according to criteria established by the Standing Committee. Such background check to include but not be limited to criminal records, credit checks, reference checks, sex offender registry checks, verification of education, employment and ordination and review of all complaints, charges and allegations while an ordained person;

...

All such background checks and evaluations shall be conducted specifically for the election being conducted and not for any prior election or other process or purpose.

### **STEPS IN THE DISCERNMENT PROCESS REGARDING BACKGROUND SCREENING AND EVALUATIONS**

Listed below are the typical steps involved in gathering and making decisions about and with information about applicants in episcopal searches.

- Obtain all the information you want to know about him/her to aid in the discernment process by first asking the applicant.
  - That does not mean that all information is gathered in the same way or by the same persons/means or reviewed by the same people.
- Verify important information that you have obtained from the applicant with the original source (educational institution, Recorder of Ordinations, public records, etc.).
  - This can be a tedious and potentially expensive part of the process and the purpose is often not understood and decisions about how much information to verify are often not consciously made.
- Obtain information that cannot be obtained directly from applicant, generally from experts.
  - This is where medical, psychological, substance abuse and behavioral evaluations fit. While some information (self-reported and verified information) from the applicant is provided to the evaluators, it is the opinions and findings of the evaluators that become new information to add to the growing body of information about the applicant.
- Evaluate the gathered information.
  - Depending on the type of information gathered (medical, criminal, credit, psychological, behavioral, etc.), it is often difficult to know who is most qualified to evaluate and/or interpret or explain the information to the decision-makers.
- Make decisions about the applicant in light of the gathered information.

- In episcopal election processes it is not always clear who has or should have access to the gathered information and whatever evaluations have been done by experts of that information. Similarly, it is not always clear who has the authority to make decisions about the applicant based on the gathered information and evaluations.
- Retain the records of this process for potential future use or reference.
  - There are significant differences of opinion in the Church about what information about applicants or the Bishop-elect should be kept and by whom.

In Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*, the Task Force sets out what information should be retained, about whom, and where:

*(d) ... After the consecration and ordination of the bishop elected President of the Standing Committee or nominating body under Canon III.11.1(b)(1) shall promptly deliver to The Archives of The Episcopal Church a copy of all the reports of all background checks, medical, psychological and substance, chemical, and alcohol use and abuse and other addictive patterns evaluations obtained during the process for permanent retention. The President of the Standing Committee or nominating body under Canon III.11.1(b)(1) shall destroy all other copies of the reports provided to, or created within, the electing diocese other than one copy for the permanent records of the diocese.*

Set forth in supplemental materials to the report is a description of the information gathering process that the Task Force recommends be followed for each applicant that is in the semi-final stage of determining who will be nominated. It includes a list of the important subject areas that information should be gathered about. (INFORMATION GATHERING PROCESS ABOUT APPLICANTS IN EPISCOPAL SEARCH PROCESSES)

Also found in the supplemental materials is the recommended process for the discernment retreat and thereafter regarding background screening and the various evaluations. (THE SCREENING PROCESS- THE DISCERNMENT RETREAT AND BEYOND)

### **NEED FOR EXPANDED PSYCHOLOGICAL AND ADDICTIVE BEHAVIORS SCREENING**

The Task Force was given responsibility for Resolution 2018-A189 since a Task Force focused just on substance abuse was not created.

*Resolved, That the Task Force prepare a report for the 80th General Convention giving recommendations with respect to alcohol and substance abuse for (1) screening processes for dioceses to employ in the ordination process, including how to best evaluate applicants with a history of addictions who are now living in recovery (2) training for Standing Committees, Commissions on Ministry and others involved in the ordination process, including diocesan staff, and (3) training and other appropriate recommendations for persons in the ordination process; and be it further*

Since the Task Force's principal focus is to assist the Office of Pastoral Development, the same group that worked on other aspects of screening for episcopal elections looked at the resolve from 2018-A189 and the issue of expanding the psychological evaluation for bishops-elect and nominees for bishop. The group investigated the typical processes used for the psychological evaluation of applicants in episcopal search processes as well as the current protocol for the evaluation of Bishops-elect conducted by the Presiding Bishop through the Office of Pastoral Development. The Task Force is proposing amendments to the Canons that would expand the long-standing requirements for psychological and psychiatric evaluation for those seeking ordination to the diaconate and priesthood, priests and deacons being received from other churches as well as nominees for Bishops, Bishops-elect and Bishops from other Provinces of the Anglican Communion who will serve as Assistant Bishops in this Church to include evaluation of:

*"... substance, chemical and alcohol use and abuse and other addictive patterns ... ."*

These proposals are contained in Resolution A083, *Amend Various Canons Regarding Screening Prior to Ordination or Reception*, for the diaconate, priesthood, reception, and Bishops-elect and and for nominees for Bishop and Assistant Bishops in Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*.

The Task Force believes that there would be significant benefits to making the psychological evaluation more rigorous, utilizing regional centers of excellence experienced in evaluation professionals, having a more uniform approach to these examinations, and requiring, by canon, that they be completed prior to any person being placed in nomination for election as bishop of a diocese.

The areas for psychological evaluation as well as additional recommendations about the psychological evaluation process may be found in the supplemental materials at the end of this report. (PSYCHOLOGICAL EVALUATION)

The typical schedule and content of a rigorous psychological evaluation process may also be found in the supplemental materials. (PSYCHOLOGICAL SCREENING EXAMINATION DETAILS)

## **PRACTICES FOR GATHERING AND SHARING INFORMATION GATHERED IN EPISCOPAL SEARCH PROCESSES**

One of the big issues in the episcopal search processes in the Church is who should see and/or have access to various information gathered during the search and nomination process. Currently, there is nothing in the church wide canons about this issue: not what information should be gathered, who should have access to it during the process and whether and/or where such information should be retained. The church-wide canons are clear that it is the diocese that carries out whatever discernment process it chooses to use to select nominees for election as bishop to serve in that diocese. There is no canonical role for any other body or office in the Church until after a bishop is elected.

However, as we all know, over the past 30 years or so the Office of Pastoral Development of the Presiding Bishop has been very involved in providing advice, expertise, and assistance in episcopal election processes. In part, this has been done because post-election, by canon, the Bishop-elect must undergo a medical and psychological examination using forms and processes and an examiner chosen by the Presiding Bishop. The Office of Pastoral Development has routinely received information about the medical and psychological evaluations, if any, performed on applicants for bishop prior to election and has routinely received information on criminal records and credit history of applicants and/or bishops-elect.

At times, it has not been clear under what authority such information has been provided to the Office of Pastoral Development and/or to what extent the Office of Pastoral Development has made or recommended whether or not an applicant or bishop-elect should continue in a process. Normatively, the Office of Pastoral Development consults with subject matter experts about information of concern and makes the experts available to the search and/or Standing Committee.

The Task Force recommends that the Bishop of the Office of Pastoral Development have express/explicit authorization:

- to clarify that it is within the scope of Office of Pastoral Development’s authority to share information that he/she becomes aware of regarding a potential nominee and to engage the potential nominee and the appropriate diocesan structure (such as search committee, Standing Committee, Bishop Diocesan); and
- to consult experts regarding the information and situation and share the experts and/or their thoughts with the appropriate diocesan structure.

Many in the Church are reluctant to have search committees and/or Standing Committees directly receive and/or evaluate information from pre-election medical and psychological evaluations and background screening such as criminal records and credit histories, often out of concern for the applicant’s privacy and a concern that the information would not remain confidential (despite there being no actual right of confidentiality once the applicant signs a release document).

The Task Force recommends the practices set out in the supplemental materials at the end of this report for handling information obtained from background screening and the various evaluations obtained in episcopal search processes. (HANDLING OF INFORMATION YIELDED BY PSYCHOLOGICAL EVALUATION AND OTHER SCREENING)

The Task Force recommends the following process and procedure for the gathering of information relevant to the episcopal search and election process:

- At the beginning of the search process, every applicant signs a release and waiver forms expressly giving search committees, Standing Committees, the Office of Pastoral Development and others with a “need to know” the right to see all information gathered about an applicant including, but not limited to public records, medical evaluations,

psychological evaluations, behavioral health evaluations, and substance abuse evaluations as well as granting all of those persons the right to consult with evaluators and experts.

- Additional persons who might be included in the non-specified but “need to know” category would include:
  - Chancellor of electing diocese
  - Chancellor to the Presiding Bishop
  - Bishop of electing diocese
  - Bishop of diocese in which applicant is canonically resident
  - Bishop of diocese in which applicant is licensed and serving

The routine practice would be as follows:

- All background screening information including public records checks and complete medical/psychological/behavioral/substance abuse evaluations provided to the Chair of the search committee of the electing diocese and Office of Pastoral Development simultaneously.
- If there is any negative or questionable information whatsoever, the background screening information and records or evaluations, in full, are shared with the entire search committee.
- If after providing the information to the search committee the search committee recommends the applicant to the Standing Committee as a potential nominee, the background screening information and records or evaluations, in full, are provided to the entire Standing Committee.
- Depending on the seriousness of the information of concern, the Standing Committee discloses the information to the electing convention well in advance of the election.
- Nothing in the above listing is meant to preclude or prohibit additional consultations at any and all steps in the process with those deemed by President of the Standing Committee, the Chair of the search committee, the Office of Pastoral Development, the search committee as a whole, or Standing Committee as a whole to be helpful to the discernment process.
- Similarly, nothing in the above listing is meant to preclude or prohibit informing or consulting with the applicant about the information of concern.

The Task Force proposes that some of these steps be added to the Canons in Resolution A079, *Amend Canon III.11.1 Regarding Screening of Nominees for Episcopal Elections*, specifically as follows:

*... (d) Reports of all background checks, medical, psychological and substance, chemical or alcohol use and abuse evaluations shall be initially provided simultaneously to the Standing Committee*

*President of the electing diocese or nominating body under Canon III.11.1(b)(1) and to the Presiding Bishop. ...*

**RESOLUTIONS REGARDING BACKGROUND SCREENING AND MEDICAL, PSYCHOLOGICAL AND OTHER EVALUATIONS IN EPISCOPAL ELECTIONS**

As mentioned previously, the canons do not require any background screening, or medical, psychological or other evaluations of nominees for bishop prior to the election. It is only post-election that the Bishop-elect must undergo a medical and psychiatric and psychological evaluation under Canon III.11.3(a)(2). In contrast, background screening and psychological evaluation are required before ordination to be a Deacon, before ordination to be a Priest (if more than 36 months have passed since the screening and evaluation for ordination to the diaconate), of Priests and Deacons being received into The Episcopal Church from other Provinces of the Anglican Communion and other denominations, and of Bishops of other Provinces of the Anglican Communion who will serve as Assistant Bishops in this Church.

It is a nearly universal practice, however, that background screening is conducted by nearly all electing dioceses before a person is actually included as a nominee on the slate. Many electing dioceses have also adopted the practice of requiring medical evaluations and psychological and/or psychiatric evaluation before a person is actually included as a nominee on the slate for bishop.

Also, many dioceses in both their processes leading to ordination to the diaconate and priesthood and in their episcopal election processes require evaluations of substance use and abuse and other addictive behaviors.

In order to both bring consistency to the treatment of the various ordination, reception, and election processes, to recognize the necessity and importance of nominees for bishop having background screens and thorough evaluations, and to update the best practice for evaluations to include substance abuse and other addictive behaviors, the Task Force proposes Resolution A079, *Amend Canon III.11.1 regarding Screening of Nominees for Episcopal Elections*, to accomplish these critical steps in the discernment process for bishops.

In addition, the Task Force, with the approval and consent of the Church Pension Fund, proposes Resolution A082, *Amend Various Canons Regarding Preparation of Medical and Psychological Evaluation in the Ordination, Episcopal Election, and Reception Processes*. If adopted, the canonical amendments would move the responsibility for preparing the forms for the medical, psychological and/or psychiatric evaluations in the ordination, reception and election processes from the Church Pension Group to a church wide body in recognition of the realities of the changing role and expertise of the Church Pension Fund and the expanded purposes for such evaluations. The Resolution also provides that it is the work of the whole Church, and not just an agency of the Church, with the participation of all orders of ministry as well as experts, to develop the forms. The Resolution is written to provide that it will be a new Standing Commission on Ministry and Formation

being proposed by the Standing Commission on Structure, Governance and Constitution and Canons that will have responsibility for this important task. If the General Convention chooses not to create this Standing Commission, the Resolution provides that either a Task Force or a subcommittee of the Standing Commission on Structure, Governance and Constitution and Canons have that responsibility.

### **DEVELOP PROCESSES AND RESOURCES TO ENCOURAGE DIVERSITY IN THE EPISCOPATE**

We acknowledge that the portion of Resolution 2018-A147 which calls for gathering and analyzing data on episcopal elections, and the portion of Resolution 2018-A138 which calls for engaging experts to analyze said data regarding elections and report to the Executive Council and, triennially, to the General Convention, was not possible to accomplish this triennium. The dearth of data available would render analysis difficult, and points to the need for the development of an instrument and process by which information is gathered. In working with Dr. Sasha Killewald, PhD., Professor of Sociology at Harvard University, it was determined that more time needs to be spent creating an investigative questionnaire for data collection, a mechanism for collecting it, and a repository for this data. Analysis of this data will require the use of a trained professional. Once we have done this front-end work, we may engage in a meaningful analysis and learn what we may want to put in place to increase and encourage diversity in the episcopal search and election process. Some of the things we are curious about are :

- What was the tipping point that lead to the election of more women?
- How does the diversity of the slate reflect the diocese?
- Of the women and people of color elected, who participated in a cohort group?
- Have the search committees done anti-bias training?
- Have there been non-traditional search processes that have led to more diverse slates?

This is work that we will want to continue into the next triennium and will require the design of mechanisms by which to collect and analyze information.

The Task Force re-affirms the recommendation that Section III (Diversity) of the Blue Book Report of the Task Force on the Episcopacy (2018) be provided to dioceses at the beginning of their search process along with such other information with respect to diversity as the Office of Pastoral Development, assisted by the Task Force to Assist the Office of Pastoral Development, may deem appropriate, all such information to be updated at least triennially. This too is work that should continue into the next triennium along with specific actions from Resolution 2018-A145 to:

- Encourage a diverse applicant pool and follow a search and election process that reduces the likelihood of discrimination based on the criteria contained in Canon III.1.2

- Ensure that the process is transparent throughout the entire search and election process.
- Provide accountability for all involved in the search and election process.
- Require, prior to nomination, the collection of pertinent data on applicants being considered for nomination using the most current means available for background checks, financial information, and interviews of all bishops and transition officers having knowledge of a person being considered for nomination.

### **RESOURCES TO ENCOURAGE A DIVERSE APPLICANT POOL**

Since the call to form this task force (2018) the church has enjoyed a significant increase in the diversity of those elected to the office of bishop. Statistics from the past two decades, attached as supplemental material to this report, reveal a trend towards the greater inclusion of women, greater numbers of bishops of color, and a greater number of bishops identifying as LGBTQI. This trend is encouraging and signals a shifting in the hearts of the people in the electing bodies of the church to reflect more clearly the values of the Episcopal Church and the Jesus Movement that recognize all of God’s children as worthy, that we respect the dignity of every human being (BCP pg. 305), and that barriers of gender, race, or sexual expression should not be stumbling blocks as we seek leaders for the church. (BISHOP CONSECRATIONS BY GENDER SINCE 2000)

The increased diversity within the House of Bishops could not have been accomplished without the good work of the many people who contributed in so many ways; by the creation of discernment cohorts and conferences, individual coaches, and the creation of the online toolkit known as “Cast Wide the Net”. This toolkit sought to bring awareness to the continuing gender gaps in church leadership and compensation. Its purpose was to provide search committees, and individuals seeking professional development, with ideas and best practices for lessening these gender inequalities. “Cast Wide the Net” focuses particularly on women in the search and transition process and is still an important resource for fostering diversity in the presbytery, and undoubtedly aided in making the current episcopal election trends possible. Since 2018, 50% of the people elected to the episcopate have been women.

### **Discerning, Learning, Leading, and Living a Call to the Episcopate**

In 2019-20, several bishops and spouses were invited to contribute short videos on the particular questions such as, “how did you discern your call?”, “what have you learned since you became a bishop (or your spouse has become a bishop?)”, “what has been your leadership style?”, and finally, “what’s the life of a bishop (and their spouse) like?”. Because the pandemic changed our plans to have these videos professionally recorded, they have been created informally and, as of this writing, are planned to be posted on the TEC website as "Discerning Holy Orders". Their purpose is so that anyone who might be curious about a call to the episcopate could explore, in an accessible way, some of their own questions before embarking on a formal discernment process. As we noted, the

work of cohort groups and coaches has contributed to the increased diversity in those seeking a call to the episcopate, and the Task Force believes that this additional resource of the church might permit someone who has not had access to either cohort or coaches begin to explore their own questions about a call to the episcopate.

The work on Resolution 2018-A145's several mandates has helped to identify the need for a more accessible way to learn about and discern about the episcopate. For many, access to opportunities to engage in conversation with peers and church leaders about one's own sense of call to the episcopate have been too limited. We believe the entire church will be well served by being able to have available resources to de-mystify the call, the process, and the reality of living into the episcopate. To that end, the Task Force pursued a course of action to update and expand the materials offered through "Cast Wide the Net" and to develop a new website, "Diversity in Holy Orders", which will house not only this resource, but other resources, some still in process, calling for work in the next triennium.

### **Budget**

The Task Force to Assist the Office of Pastoral Development is planning to have at least one (1) in person meeting in 2021. Additionally, we hope to begin the process of recruitment, training and evaluation of search consultants, a necessary component of our work. The costs related to meetings, travel, meals, and trainers require the balance of our funding. We have a balance of \$89,000 and request authorization for such expenses.

## Proposed resolutions

### **A079 Amend Canon III.11.1 regarding Screening of Nominees for Episcopal Elections**

Resolved, The House of \_\_\_\_\_ concurring, That Canon III.11.1 is hereby amended by adding new subsections c and d and renumbering the remaining subsections as follows:

III.11.1

#### **Sec. 1**

**a.** Discernment of vocation to be a Bishop occurs through a process of election in accordance with the rules prescribed by the Convention of the Diocese and pursuant to the provisions of the Constitution and Canons of this Church. With respect to the election of a Bishop Suffragan, the Diocese shall establish a nominating process either by Canon or by the adoption of rules and procedure for the election of the Bishop Suffragan at a regular or special Diocesan Convention with sufficient time preceding the election of the Bishop Suffragan.

**b.** In lieu of electing a Bishop, the Convention of a Diocese may request that an election be made on its behalf by the House of Bishops of the Province of which the Diocese is a part, subject to confirmation by the Provincial Synod, or it may request that an election be made on its behalf by the House of Bishops of The Episcopal Church.

1. If either option in Sec. 1.b is chosen, a special Joint Nominating Committee shall be appointed unless the Diocesan Convention has otherwise provided for the nominating process. The Committee shall be composed of three persons from the Diocese, appointed by its Standing Committee, and three members of the electoral body, appointed by the President of that body. The Joint Nominating Committee shall elect its own officers and shall nominate three persons whose names it shall communicate to the Presiding Officer of the electoral body. The Presiding Officer shall communicate the names of the nominees to the electoral body at least three weeks before the election when the names shall be formally placed in nomination. Opportunity shall be given for nominations from the floor or by petition, in either case with provision for adequate background checks.

2. If either option in Sec. 1.b is chosen, the evidence of the election shall be a certificate signed by the Presiding Officer of the electoral body and by its Secretary, with a testimonial signed by a constitutional majority of the body, in the form required in Canon III.11.3, which shall be sent to the Standing Committee of the Diocese on whose behalf the election was held. The Standing Committee shall thereupon proceed as set forth in Canon III.11.3.

**c.** *Prior to any person's name being placed in nomination for election as a Bishop in a diocese, whether by the nominating body or by petition, floor nomination or in any other way, the diocese shall have:*

1. *conducted a thorough background check of each nominee according to criteria established by the Standing Committee. Such background check to include but not be limited to criminal records, credit checks, reference checks, sex offender registry checks, verification of education, employment and ordination and review of all complaints, charges and allegations while an ordained person;*
2. *each nominee evaluated by a licensed medical doctor approved by the Standing Committee;*
3. *each nominee evaluated by a licensed psychologist approved by the Standing Committee, with psychiatric referral if desired or necessary;*
4. *each nominee evaluated for substance, chemical and alcohol use and abuse and other addictive patterns whether as part of the medical examination, psychological examination or otherwise by professionals approved by the Standing Committee;*

*All such background checks and evaluations shall be conducted specifically for the election being conducted and not for any prior election or other process or purpose.*

**d.** *Reports of all background checks, medical, psychological and substance, chemical or alcohol use and abuse evaluations shall be initially provided simultaneously to the Standing Committee President of the electing diocese or nominating body under Canon III.11.1.b.1 and to the Presiding Bishop. After the consecration and ordination of the bishop elected President of the Standing Committee or nominating body under Canon III.11.1.b.1 shall promptly deliver to The Archives of The Episcopal Church a copy of all the reports of all background checks, medical, psychological and substance, chemical, and alcohol use and abuse and other addictive patterns evaluations obtained during the process for permanent retention. The President of the Standing Committee or nominating body under Canon III.11.1.b.1 shall destroy all other copies of the reports provided to, or created within, the electing diocese other than one copy for the permanent records of the diocese.*

~~c.~~ **e.** *The Secretary of the body electing a Bishop Diocesan, Bishop Coadjutor, or Bishop Suffragan, shall inform the Presiding Bishop promptly of the name of the person elected. It shall be the duty of the Bishop-elect to notify the Presiding Bishop of acceptance or declination of the election, at the same time as the Bishop-elect notifies the electing Diocese.*

~~d.~~ **f.** *No Diocese shall elect a Bishop within thirty days before a meeting of the General Convention.*

#### EXPLANATION

This Resolution has several purposes. One is to bring a degree of consistency to the discernment screening and evaluations that are conducted for those in discernment (or reception) processes to become a Priest or Deacon and those used when a Bishop is elected. Currently, background screening and medical, psychological, and psychiatric evaluations are conducted prior to ordination or reception from another denomination or Province of the Anglican Communion for Priests, Deacons, and Bishops of other Provinces of the Anglican Communion who will serve as Assistant Bishops. Currently the canons do not require any background screening or evaluations prior to the

election of a Bishop for a Diocese. It is only after an election that the Bishop-elect must have medical, psychological, and psychiatric evaluations, even though the recommended process and wide-spread practice is to conduct background screening and medical, psychological, and psychiatric evaluations on all those who are nominated. This Resolution would make that best practice a requirement.

Another purpose is to broaden the current medical, psychological, and psychiatric evaluations in Bishop discernment processes to include chemical, and alcohol use and abuse and other addictive patterns evaluations. Experience has shown that such issues are not necessarily identified in routine medical, psychological, and psychiatric evaluations, and that failure can lead to serious consequences for the electing Diocese and for the Bishop and his/her family.

Another purpose is to address the issue of who should initially receive the results of the background screening and evaluations. Presently, the canons are silent and there is no generally agreed upon best practice. This lack has led to confusion and some misunderstandings on who the information belongs to and who should review it and make decisions about it. Since it is the electing Diocese that is having the screening and evaluations done and it is the electing Diocese that has to make the discernment of who is appropriate and fit to serve as its Bishop, and it is the electing Diocese that will incur most of the consequences of any problems or issues with the new Bishop, the electing Diocese needs to have all the information from the screening and evaluations to assist it in its discernment. The Resolution aims to balance the interests of the electing Diocese having the information it needs for its discernment process with the interest that a nominee has in sensitive information being handled and shared appropriately with the Presiding Bishop's interest in the overall health and fitness of persons who will serve as Bishops. The proposed canon does not prohibit the sharing of information beyond the President of the Standing Committee and the best practice would have the President consult with the Presiding Bishop (through the Office of Pastoral Development), and perhaps Chancellors, subject matter experts, and the nominee prior to further sharing of the information.

And, the Resolution provides for the appropriate destruction of the evaluations and background screening information and also for the appropriate retention of the information for the person elected Bishop only in case the information becomes relevant in the future.

**A080 Amend Canon III.11.3 and 4 reducing time for Consents to Bishop Elections from 120 to 90 days**

Resolved, The House of \_\_\_\_\_ concurring, That Canon III.11.3 be amended as follows:

Canon III.11.3

**Sec. 3**

a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

**We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.**

(Date) \_\_\_\_\_

(Signed) \_\_\_\_\_

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent *to be submitted to the Presiding Bishop within not more than ninety days*. Each Standing Committee, in not more than ~~one hundred and twenty~~ ninety days after the sending by the electing body of the certificate of the election, shall respond by sending the

Standing Committee of the Diocese for which the Bishop is elected either the testimonial of consent in the form set out in paragraph (b) of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop receives sufficient statements to indicate a majority of ~~those~~ *the Bishops exercising jurisdiction* consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

b. Evidence of the consent of each Standing Committee shall be a testimonial in the following words, signed by a majority of all the members of the Committee:

**We, being a majority of all the members of the Standing Committee of \_\_\_\_\_, and having been duly convened, fully sensible how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Order. In witness whereof, we have hereunto set our hands this \_\_\_\_\_ day of \_\_\_\_\_ in the year of our Lord \_\_\_\_\_.**

(Signed) \_\_\_\_\_

c. Testimonials required of the Standing Committee by this Title must be signed by a majority of the whole Committee, at a meeting duly convened, except that testimonials may be executed in counterparts, any of which may be delivered by facsimile or other electronic transmission, each of which shall be deemed an original.

And be it further.

Resolved, that Canon III.11.4 be amended as follows:

**Sec. 4.** In case a majority of all the Standing Committee of the Dioceses do not consent to the ordination of the Bishop-elect within ~~one hundred and twenty~~ *ninety* days from the date of the notification of the election by the Standing Committee of the Diocese for which the Bishop was elected, or in case a majority of all the Bishops exercising jurisdiction do not consent within ~~one hundred and twenty~~ *ninety* days from the date of notification to them by the Presiding Bishop of the election, the Presiding Bishop shall declare the election null and void and shall give notice to the Standing Committee of the Diocese for which the Bishop was elected and to the Bishop-elect. The Convention of the Diocese may then proceed to a new election.

EXPLANATION

The time between the election of a bishop for a diocese and the ordination of the Bishop-elect needs to be long enough to obtain the necessary consents from a majority of bishops with jurisdiction and Standing Committees, long enough to allow for the ending of whatever role the Bishop-elect currently holds, long enough for the Bishop-elect and family to relocate, if necessary, and long enough to make the necessary preparations for the ordination and celebration. However, if that period is too long, the Bishop-elect and family, the people in the place the Bishop-elect currently serves, the electing diocese and the departing Bishop and family are in a state of limbo where no one can move forward to whatever is next. A balancing of these concerns is needed to determine the right amount of time.

The world and its use of technology has changed significantly since 1901 when the Church set the time within which consents to the elections of bishops must be in at three months for bishops and six months for Standing Committees. In 1994 the time for consents of both bishops and Standing Committees was changed to four months (and to 120 days in 1997). Gathering the consents and required certifications prior to the ordination of a Bishop-elect is the responsibility of the Presiding Bishop and the Standing Committee of the electing Diocese, and is facilitated by the General Convention Office. Beginning in 2019 bishops have been able to provide their consents online through a software module developed by the General Convention Office. Currently, the consents from bishops are actually received in roughly sixty days (two months). As of August 2019 Standing Committees can submit information on consents electronically, thus eliminating the need to provide for submitting consents by mail or delivery service from across the United States and from the other countries in which dioceses are located. The Task Force recommends that The reason to not shorten the time period for Standing Committees to less than ninety days (three months) is that some Standing Committees do not meet every month, especially during the summer months.

The Task Force believes that with the ability to provide consents electronically reducing the time within which bishops with jurisdiction and Standing Committees must provide their consents from 120 days (four months) to ninety-days (three months) will allow sufficient time for bishops and Standing Committees while reducing the time that everyone is in limbo.

## **A081 Amend Canon III.11.1.a regarding Standing Committee's Role in Episcopal Elections**

Resolved, The House of \_\_\_\_\_ concurring, That Canon III.11.1 be amended as follows:

Canon III.11

Sec. 1

a. Discernment of vocation to be a Bishop *Diocesan, Coadjutor, or Suffragan* occurs through a process of election in accordance with ~~the rules prescribed by the Convention of the Diocese and pursuant to the provisions of the Constitutions and Canons of this Church and the electing Diocese and any special rules adopted by the Convention of that Diocese.~~ *Unless otherwise provided in the electing Diocese's Constitution or Canons, the Standing Committee shall have oversight of, and responsibility for, any search, nomination, transition, and election processes.* ~~With respect to the election of a Bishop Suffragan,~~ *the* The Diocese shall establish a nominating process either by Canon or by the adoption of rules and procedures for the election of the Bishop ~~Suffragan~~ at a regular or special *meeting of the Diocesan* Convention of the Diocese with sufficient time preceding the election of the Bishop ~~Suffragan~~.

b. In lieu of electing a Bishop, the Convention of a Diocese may request that an election be made on its behalf by the House of Bishops of the Province of which the Diocese is a part, subject to confirmation by the

Provincial Synod, or it may request that an election be made on its behalf by the House of Bishops of The Episcopal Church.

1. If either option in Sec. 1.b is chosen, a special Joint Nominating Committee shall be appointed unless the Diocesan Convention has otherwise provided for the nominating process. The Committee shall be composed of three persons from the Diocese, appointed by its Standing Committee, and three members of the electoral body, appointed by the President of that body. The Joint Nominating Committee shall elect its own officers and shall nominate three persons whose names it shall communicate to the Presiding Officer of the electoral body. The Presiding Officer shall communicate the names of the nominees to the electoral body at least three weeks before the election when the names shall be formally placed in nomination. Opportunity shall be given for nominations from the floor or by petition, in either case with provision for adequate background checks.

2. If either option in Sec. 1.b is chosen, the evidence of the election shall be a certificate signed by the Presiding Officer of the electoral body and by its Secretary, with a testimonial signed by a constitutional majority of the body, in the form required in Canon III.11.3, which shall be sent to the Standing Committee of the Diocese on whose behalf the election was held. The Standing Committee shall thereupon proceed as set forth in Canon III.11.3.

c. The Secretary of the body electing a Bishop Diocesan, Bishop Coadjutor, or Bishop Suffragan, shall inform the Presiding Bishop promptly of the name of the person elected. It shall be the duty of the Bishop-elect to notify the Presiding Bishop of acceptance or declination of the election, at the same time as the Bishop-elect notifies the electing Diocese.

d. No Diocese shall elect a Bishop within thirty days before a meeting of the General Convention.

#### EXPLANATION

It is generally understood across the Church that when a diocese is going to elect a bishop, the Standing Committee of the electing diocese is responsible for the process, subject to the church wide Constitution and Canons and the Constitution and Canons and any rules adopted by the Convention of the electing diocese. This amendment would simply state the general understanding of who has the responsibility for the overall process while still explicitly allowing a diocese to put some other body in charge of part or all of the process by specifying that in its constitution or canons.

### **A082 Amend Various Canons Regarding Preparation of Medical and Psychological Evaluation in the Ordination, Episcopal Election, and Reception Processes**

*Resolved*, The House of \_\_\_\_\_ concurring, That forms prescribed by the Canons to be used in medical and psychological evaluations of persons prior to their ordination as deacon, priest, and bishop, or of persons already ordained in another church prior to their reception into this Church, require revision and updating; and be it further

*Resolved*, That the 80th General Convention agrees with the Church Pension Fund that as the purposes and needs of the forms have changed over time, a more appropriate group should be named to prepare forms that meet all the needs of the Church; and be it further

*Resolved*, That in developing the forms described in Canons III.6.5.j.2, III.8.5.k.2, III.10.1.b, and III.11.3.a.2, the Standing Commission on Ministry and Formation (or the committee of the Standing Commission on Structure, Governance, Constitution and Canons; or the task force specially designated by the General Convention) shall consult with (i) at least two experts in the field of medicine; (ii) at least two experts in the field of psychology; (iii) persons of all orders knowledgeable about and involved in diocesan ordination processes, such as persons serving on Commissions on Ministry or other discernment bodies, Standing Committees, bishops, and other persons serving in other discernment-related roles; and for forms designed for persons being evaluated as bishops, bishops-elect or nominees for bishop (iv) the Office of Pastoral Development; and be it further

Resolved, That if a Standing Commission on Ministry and Formation is created that Canons III.6.5.j,2, III.8.5.k.2, III.10.1.b, and III.11.3.a.2 be amended as follows:

Canon III.6.5.j

**Sec. 5.** Preparation for Ordination

**j.** Within thirty-six months prior to ordination as a Deacon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention* and if desired or necessary, psychiatric referral.

Canon III.8.5.k.2

**Sec. 5.** Preparation for Ordination

**a.** The Bishop and the Commission shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Priesthood and to ensure that pastoral guidance is provided throughout the period of preparation.

**b.** If the Postulant or Candidate has not previously obtained a baccalaureate degree, the Commission, Bishop, and Postulant or Candidate shall design a program of such additional academic work as may be necessary to prepare the Postulant or Candidate to undertake a program of theological education.

**c.** Formation shall take into account the local culture and each Postulant or Candidate's background, age, occupation, and ministry.

**d.** Prior education and learning from life experience may be considered as part of the formation required for the Priesthood.

**e.** Whenever possible, formation for the Priesthood shall take place in community, including other persons in preparation for the Priesthood, or others preparing for ministry.

**f.** Formation shall include theological training, practical experience, emotional development, and spiritual formation.

**g.** Subject areas for study during this program of preparation shall include:

1. The Holy Scriptures.
2. History of the Christian Church.
3. Christian Theology.
4. Christian Ethics and Moral Theology.

5. Christian Worship according to the use of the Book of Common Prayer, the Hymnal, and authorized supplemental texts.

6. The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, and the historical and contemporary experience of racial and minority groups.

**h.** Preparation for ordination shall include training regarding

1. prevention of sexual misconduct against both children and adults.

2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.

3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.

4. the Church's teaching on racism.

**i.** Each Postulant or Candidate for ordination to the Priesthood shall communicate with the Bishop in person or by letter, four times a year, in the Ember Weeks, reflecting on the Candidate's academic experience and personal and spiritual development.

**j.** The seminary or other formation program shall provide for, monitor, and report on the academic performance and personal qualifications of the Postulant or Candidate for ordination. These reports will be made upon request of the Bishop and Commission, but at least once per year.

**k.** Within thirty-six months prior to ordination as a Deacon under this Canon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.

2. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention*, and if desired or necessary, psychiatric referral.

**l.** Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.

Canon III.10.1.b

**Sec. 1.** Prior to reception or ordination, the following must be provided

**b.** medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by ~~The Church Pension Fund~~, *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention* and if desired or necessary, psychiatric referral. ~~If the medical examination, psychological examination, or~~

~~background check have taken place more than thirty six months prior to reception or ordination they must be updated.~~ All such background checks and evaluations shall be conducted specifically for the ordination or reception under this Canon and not for any other process or purpose.

Canon III.11.3.a.2

**Sec. 3**

a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund *the Standing Commission on Ministry and Formation in accordance with principles and directions adopted by the General Convention* shall be used for this purpose; and
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

**We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.**

(Date) \_\_\_\_\_

(Signed) \_\_\_\_\_

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent. Each Standing Committee, in not more than one hundred and twenty days after the sending by the electing body of the certificate of the election, shall respond by sending the Standing Committee of the Diocese for which the Bishop is elected either the testimonial

of consent in the form set out in paragraph (b) of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop receives sufficient statements to indicate a majority of those Bishops consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

And be it further;

*Resolved*, That if a Standing Commission on Ministry and Formation is NOT created that Canons III.6.5.j.2, III.8.5.k.2, III.10.1.b, and III.11.3.a.2 be amended as follows:

Canon III.6.5.j

**Sec. 5.** Preparation for Ordination

**j.** Within thirty-six months prior to ordination as a Deacon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, *a committee of the Standing Commission on Structure, Governance, Constitution and Canons or a task force assigned by the General Convention, in accordance with principles and directions adopted by the General Convention*, and if desired or necessary, psychiatric referral.

Canon III.10.1.b

**Sec. 1.** Prior to reception or ordination, the following must be provided

**b.** medical and psychological evaluation by professionals approved by the Bishop, using forms prepared for the purpose by ~~The Church Pension Fund~~, *a committee of the Standing Commission on Structure, Governance, Constitution and Canons or a task force assigned by the General Convention, in accordance with principles and directions adopted by the General Convention*, and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.

Canon III.11.3.a.2

**Sec. 3**

**a.** The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding

Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological and psychiatric condition and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund, *a committee of the Standing Commission on Structure, Governance, Constitution and Canons or a task force assigned by the General Convention, in accordance with principles and directions adopted by the General Convention*; and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

**We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.**

(Date) \_\_\_\_\_

(Signed) \_\_\_\_\_

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent. Each Standing Committee, in not more than one hundred and twenty days after the sending by the electing body of the certificate of the election, shall respond by sending the Standing Committee of the Diocese for which the Bishop is elected either the testimonial of consent in the form set out in paragraph b. of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop

receives sufficient statements to indicate a majority of those Bishops consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

#### EXPLANATION

The Episcopal Church Canons require medical and psychological evaluations prior to ordination for deacons (Canon III.6.5.j.2), priests (Canon III.8.5.k.2), and bishops (Canon III.11.3.a.2), as well as for persons ordained in other churches being received into The Episcopal Church (Canon III.10.1.b). Each of these Canons prescribes that those evaluations be undertaken using forms prepared by The Church Pension Fund (CPG).

There has been a need for some time for an updating of these forms. As it began the process for this update, CPG recognized that these new forms would best be prepared by a group with a mandate more aligned with the needs of today's Church, a point with which we agree. The purposes served by the forms have indeed evolved over the years. CPG originally got involved with this task in the early 20th Century when it noticed an inordinate number of relatively newly-ordained clergy taking long-term disability. As the Church's primary benefits provider, CPG had an interest in guarding against that, as did the Church. Later, as its Church Insurance entities also became a provider of liability insurance to much of the Church, CPG gained an additional interest, in guarding against potential liability. The Church shares that interest, as well. As important as those two concerns are, however, the Church's interests in the medical and psychological screening of persons in the ordination, bishop discernment and reception processes are much broader, including a range of topics that explore fitness for ministry.

Accordingly, the Task Force proposes that the Canons be amended to provide that the preparation of forms be undertaken either by a newly-created Standing Commission on Ministry and Formation, the creation of which is being proposed by the Standing Commission on Structure, Governance, Constitution and Canons; or, if such a Standing Commission is not created, by a committee of Standing Commission on Structure, Governance, Constitution and Canons unless a task force is created by the General Convention especially for that purpose. Further, we propose that whichever body undertakes the task, it be charged with consulting with medical and psychological professionals as well as persons with a variety of roles in the discernment process. We have confirmed with the Chief Executive Officer of the Church Pension Fund that it is agreeable to having another body of the Church responsible for the preparation of these forms.

**A083 Amend Various Canons Regarding Screening Prior to Ordination or Reception**

Resolved, The House of \_\_\_\_\_ concurring, That Canon III.6.5.j.2 be amended to read as follows:

III.6

**Sec. 5. Preparation for Ordination**

- a. The Bishop and the Commission shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Diaconate in accordance with this Canon to ensure that pastoral guidance is provided throughout the period of preparation.
- b. The Bishop may assign the Postulant or Candidate to any congregation of the Diocese or other community of faith after consultation with the Member of the Clergy or other leader exercising oversight.
- c. Formation shall take into account the local culture and each Postulant or Candidate's background, age, occupation, and ministry.
- d. Prior education and learning from life experience may be considered as part of the formation required for ordination.
- e. Wherever possible, formation for the Diaconate shall take place in community, including other persons in preparation for the Diaconate, or others preparing for ministry.
- f. Before ordination each Candidate shall be prepared in and demonstrate basic competence in five general areas:
  - 1. Academic studies including, The Holy Scriptures, theology, and the tradition of the Church.
  - 2. Diakonia and the diaconate.
  - 3. Human awareness and understanding.
  - 4. Spiritual development and discipline.
  - 5. Practical training and experience.
- g. Preparation for ordination shall include training regarding
  - 1. prevention of sexual misconduct against both children and adults.
  - 2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
  - 3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
  - 4. the Church's teaching on racism.

**h.** Each Candidate for ordination to the Diaconate shall communicate with the Bishop in person or by letter, four times a year, in the Ember Weeks, reflecting on the Candidate's academic, diaconal, human, spiritual, and practical development.

**i.** During Candidacy each Candidate's progress shall be evaluated from time to time, and there shall be a written report of the evaluation by those authorized by the Commission to be in charge of the evaluation program. Upon certification by those in charge of the Candidate's program of preparation that the Candidate has successfully completed preparation and is ready for ordination, a final written assessment of readiness for ordination to the Diaconate shall be prepared as determined by the Bishop in consultation with the Commission. This report shall include a recommendation from the Commission regarding the readiness of the Candidate for ordination. Records shall be kept of all evaluations, assessments, and the recommendation, and shall be made available to the Standing Committee.

**j.** Within thirty-six months prior to ordination as a Deacon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral.

**k.** Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.

and be it further;

*Resolved*, that Canon III.8.5.k.2 be amended as follows:

III.8

**Sec. 5.** Preparation for Ordination

**a.** The Bishop and the Commission shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Priesthood and to ensure that pastoral guidance is provided throughout the period of preparation.

**b.** If the Postulant or Candidate has not previously obtained a baccalaureate degree, the Commission, Bishop, and Postulant or Candidate shall design a program of such additional academic work as may be necessary to prepare the Postulant or Candidate to undertake a program of theological education.

**c.** Formation shall take into account the local culture and each Postulant or Candidate's background, age, occupation, and ministry.

- d.** Prior education and learning from life experience may be considered as part of the formation required for the Priesthood.
- e.** Whenever possible, formation for the Priesthood shall take place in community, including other persons in preparation for the Priesthood, or others preparing for ministry.
- f.** Formation shall include theological training, practical experience, emotional development, and spiritual formation.
- g.** Subject areas for study during this program of preparation shall include:
  - 1. The Holy Scriptures.
  - 2. History of the Christian Church.
  - 3. Christian Theology.
  - 4. Christian Ethics and Moral Theology.
  - 5. Christian Worship according to the use of the Book of Common Prayer, the Hymnal, and authorized supplemental texts.
  - 6. The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, and the historical and contemporary experience of racial and minority groups.
- h.** Preparation for ordination shall include training regarding
  - 1. prevention of sexual misconduct against both children and adults.
  - 2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
  - 3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing, but not limited to use of, the Title IV training website of The Episcopal Church.
  - 4. the Church's teaching on racism.
- i.** Each Postulant or Candidate for ordination to the Priesthood shall communicate with the Bishop in person or by letter, four times a year, in the Ember Weeks, reflecting on the Candidate's academic experience and personal and spiritual development.
- j.** The seminary or other formation program shall provide for, monitor, and report on the academic performance and personal qualifications of the Postulant or Candidate for ordination. These reports will be made upon request of the Bishop and Commission, but at least once per year.

**k.** Within thirty-six months prior to ordination as a Deacon under this Canon, the following must be accomplished

1. a background check, according to criteria established by the Bishop and Standing Committee.
2. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral.

**l.** Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.

and be it further;

Resolved, that Canon III.8.7.a.3 be amended as follows:

III.8.

**Sec. 7.** Ordination to the Priesthood

**a.** A person may be ordained Priest:

1. after at least six months since ordination as a Deacon under this Canon and eighteen months from the time of acceptance of nomination by the Nominee as provided in III.8.2.b, and
2. upon attainment of at least twenty-four years of age, and
3. if the medical evaluation, psychological evaluation, *substance, chemical and alcohol use and abuse and other addictive patterns evaluation*, and background check have taken place or been updated within thirty-six months prior to ordination as a Priest.

**b.** The Bishop shall obtain in writing and provide to the Standing Committee:

1. an application from the Deacon requesting ordination as a Priest, including the Deacon's dates of admission to Postulancy and Candidacy and ordination as a Deacon under this Canon,
2. a letter of support from the Deacon's congregation or other community of faith, signed by at least two-thirds of the Vestry and the Member of the Clergy or other leader exercising oversight,
3. evidence of admission to Postulancy and Candidacy, including dates of admission, and ordination to the Diaconate,
4. a certificate from the seminary or other program of preparation, written at the completion of the program of preparation, showing the Deacon's scholastic record in the subjects required by the Canons, and giving an evaluation with recommendation as to the Deacon's other personal qualifications for ordination together with a recommendation regarding ordination to the Priesthood, and

5. a statement from the Commission attesting to the successful completion of the program of formation designed during Postulancy under Canon III.8.5, and proficiency in the required areas of study, and recommending the Deacon for ordination to the Priesthood.

c. On the receipt of such certificates, the Standing Committee, a majority of all the members consenting, shall certify that the canonical requirements for ordination to the Priesthood have been met and there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination, by a testimonial addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee.

**To the Right Reverend , Bishop of We, the Standing Committee of , having been duly convened at , do testify that A.B., desiring to be ordained to the Priesthood, has presented to us the certificates as required by the Canons indicating A.B.'s preparedness for ordination to the Priesthood have been met; and we certify that all canonical requirements for ordination to the Priesthood have been met, and we find no sufficient objection to ordination. Therefore, we recommend A.B. for ordination. In witness whereof, we have hereunto set our hands this day of , in the year of our Lord.**

(Signed) \_\_\_\_\_

d. The testimonial having been presented to the Bishop, and there being no sufficient objection on medical, psychological, moral, or spiritual grounds, the Bishop may ordain the Deacon to the Priesthood; and at the time of ordination the Deacon shall subscribe publicly and make, in the presence of the Bishop, the declaration required in Article VIII of the Constitution.

e. No Deacon shall be ordained to the Priesthood until having been appointed to serve in a Parochial Cure within the jurisdiction of this Church, or as a Missionary under the Ecclesiastical Authority of a Diocese, or as an officer of a Missionary Society recognized by the General Convention, or as a Chaplain of the Armed Services of the United States, or as a Chaplain in a recognized hospital or other welfare institution, or as a Chaplain or instructor in a school, college, or other seminary, or with other opportunity for the exercise of the office of Priest within the Church judged appropriate by the Bishop.

f. A person ordained to the Diaconate under Canon III.6 who subsequently expresses a call to the Priesthood shall apply to the Bishop Diocesan and the Commission on Ministry. The Commission on Ministry and Bishop Diocesan shall ensure that the Deacon meets the formational requirements set forth in III.8.5.g and shall recommend such additional steps as may be necessary and required. Upon completion of these requirements and those required for Postulancy and Candidacy as set forth in Canon III.8, the Deacon may be ordained to the Priesthood.

and be it further;

Resolved, that Canon III.10.1.b be amended as follows:

III.10

**Sec. 1.** Prior to reception or ordination, the following must be provided

- a. a background check, according to criteria established by the Bishop and Standing Committee, and
- b. medical, ~~and~~ psychological, *and substance, chemical and alcohol use and abuse and other addictive patterns* evaluations by professionals approved by the Bishop, using forms prepared for the purpose by The Church Pension Fund, and if desired or necessary, psychiatric referral. If the medical examination, psychological examination, or background check have taken place more than thirty-six months prior to reception or ordination they must be updated.
- c. evidence of training regarding
  - 1. prevention of sexual misconduct.
  - 2. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
  - 3. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
  - 4. training regarding the Church's teaching on racism.
- d. Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.
- e. Prior to reception or ordination each clergy person shall be assigned a mentor Priest by the Bishop in consultation with the Commission on Ministry. The mentor and clergy person shall meet regularly to provide the clergy person an opportunity for guidance, information, and a sustained dialogue about ministry in The Episcopal Church.

and be if further;

Resolved, that Canon III.11.3.a.2 be amended as follows:

III.11.

**Sec. 3**

- a. The Standing Committee of the Diocese for which the Bishop has been elected shall by its President, or by some person or persons specially appointed, immediately send to the Presiding Bishop and to the Standing Committees of the several Dioceses a certificate of the election by the Secretary of Convention of the Diocese, bearing a statement of receipt of:

1. evidence of the Bishop-elect's having been duly ordered Deacon and Priest;
2. certificates from a licensed medical doctor and licensed psychiatrist, authorized by the Presiding Bishop, that they have thoroughly examined the Bishop-elect as to that person's medical, psychological, ~~and~~ *psychiatric and substance, chemical and alcohol use and abuse and other addictive patterns* conditions and have not discovered any reason why the person would not be fit to undertake the work for which the person has been chosen. Forms and procedures agreed to by the Presiding Bishop and The Church Pension Fund shall be used for this purpose; and
3. evidence that a testimonial in the following form was signed by a constitutional majority of the Convention:

**We, whose names are hereunder written, fully sensible of how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Office. We do, moreover, jointly and severally declare that we believe the Reverend A.B. to have been duly and lawfully elected and to be of such sufficiency in learning, of such soundness in the Faith, and of such godly character as to be able to exercise the Office of a Bishop to the honor of God and the edifying of the Church, and to be a wholesome example to the flock of Christ.**

(Date) \_\_\_\_\_

(Signed) \_\_\_\_\_

The Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction of the Presiding Bishop's receipt of the certificates mentioned in this Section and request a statement of consent or withholding of consent. Each Standing Committee, in not more than one hundred and twenty days after the sending by the electing body of the certificate of the election, shall respond by sending the Standing Committee of the Diocese for which the Bishop is elected either the testimonial of consent in the form set out in paragraph (b) of this Section or written notice of its refusal to give consent. If a majority of the Standing Committees of all the Dioceses consents to the ordination of the Bishop-elect, the Standing Committee of the Diocese for which the Bishop is elected shall then forward the evidence of the consent, with the other necessary certificates required in this Section (documents described in Sec. 3.a.2 of this Canon), to the Presiding Bishop. If the Presiding Bishop receives sufficient statements to indicate a majority of those Bishops consent to the ordination, the Presiding Bishop shall, without delay, notify the Standing Committee of the Diocese for which the Bishop is elected and the Bishop-elect of the consent.

b. Evidence of the consent of each Standing Committee shall be a testimonial in the following words, signed by a majority of all the members of the Committee:

**We, being a majority of all the members of the Standing Committee of , and having been duly convened, fully sensible how important it is that the Sacred Order and Office of a Bishop should not be unworthily conferred, and firmly persuaded that it is our duty to bear testimony on this solemn occasion without partiality, do, in the presence of Almighty God, testify that we know of no impediment on account of which the Reverend A.B. ought not to be ordained to that Holy Order. In witness whereof, we have hereunto set our hands this day of in the year of our Lord .**

(Signed) \_\_\_\_\_

c. Testimonials required of the Standing Committee by this Title must be signed by a majority of the whole Committee, at a meeting duly convened, except that testimonials may be executed in counterparts, any of which may be delivered by facsimile or other electronic transmission, each of which shall be deemed an original.

#### EXPLANATION

This Resolution has several purposes. One is to bring a degree of consistency to the discernment screening and evaluations that are conducted for those in discernment (or reception) processes to become a Priest or Deacon and those used when a Bishop is elected. The Task Force to Assist the Office of Pastoral Development is proposing an amendment to Canon III.11.1(a) in a Resolution titled *Amend Canon III.11.1 regarding Screening of Nominees for Episcopal Elections* to require screening and evaluations of all persons who are nominees for Bishop prior to election. In that Resolution the Task Force proposes to expand the medical, psychological, and psychiatric evaluations to include chemical, and alcohol use and abuse and other addictive patterns evaluations. This Resolution would make the scope of evaluations for those in discernment or reception processes for Priest, Deacon, and Bishop the same.

In addition, this Resolution would result in more rigorous and relevant information being gathered as part of the discernment processes. Experience has shown that issues of chemical, and alcohol use and abuse and other addictive patterns are not necessarily identified in routine medical, psychological, and psychiatric evaluations, and that failure can lead to serious consequences for the congregations and Dioceses in which clergy serve.

## Continuance recommendation

We recommend a continuance of the work of the task force. The shape and form of the membership may change, i.e., Council of Advice and/or Task Force but it is our earnest request for more time to complete the work. Some of the work may be on going, for example updating the resource manual for dioceses. We used the term "in real time" in our report but, 2020 has brought us to defining ministry in "covid time" or a future time not yet know to us. Given this reality, there is a great deal of work for us to accomplish during the next triennium.

Another one of our mandates was offering virtual resources on the TEC website to help equip those who are discerning a call to the Episcopate. One of our working groups very effectively prepared the resources (videos), but they are not in a polished form due to constraints regarding staffing during the COVID-19 crisis.

We also need to provide more data on diversity in the Election process and how/why dioceses are successful when they have a diverse pool of candidates.

For the next triennium we request \$150,000.

1. This includes at least two in-person meetings, travel and accommodations.
2. We need to engage a consultant for data gathering.
3. Training and evaluating search consultants, providing accommodations for in-person trainings.

We are grateful for being entrusted with the opportunity to serve God's people.

## Supplemental Materials

1. [Bishop Consecrations](#)
2. [Job Description for Episcopal Search Consultants](#)
3. [Core Competencies for Clergy and Pastoral Ministers Addressing Alcohol and Drug Dependence and Other Addictive Behaviors](#)
4. [Information Gathering Process About Applicants in Episcopal Search Processes](#)
5. [The Screening Process - The Discernment Retreat and Beyond](#)
6. [Psychological Evaluation](#)
7. [Psychological Screen Examination Details](#)
8. [Handling of Information Yielded by Psychological Evaluation and Other Screening](#)

## **Bishop Consecrations**

There were 177 bishop consecrations from 2000 to 2020, 18% of those were women and 82% men. We observed an increase in the proportion of women consecrated as bishops in the last three triennia. In the 2012 to 2014 triennium, women accounted for 13% of the consecrations while men were at 87%. In the 2015-2017 triennium, the percentage of consecrations of women increased to 25% while that of men decreased to 75%. In the most recent triennium 2018-2020, 56% of the consecrations belonged to women while men's percentage decreased to 44%. Currently, the gender proportion of all active bishops is 26% female and 74% male. The Church Pension Group will release a new clergy trend analysis with insights on all three orders of ministry in the second half of 2021.

## **Job Description for Episcopal Search Consultants**

### **Role and Responsibilities**

- Assist Diocesan Standing Committees, the current bishop, and the search, nominating and transition committees during an episcopal search by providing education and guidance as to best practices and options as set forth in transition manual/materials/training approved by the Office of Pastoral Development
- Attend all training and continuing education sessions required by the Office of Pastoral Development
- Participate in evaluation of consultant's performance at the conclusion of the search process

### **Qualifications, Gifts and Skills**

- Familiarity with Episcopal Church polity, search/transition policies and processes, and Episcopal Church canons regarding episcopal elections
- Background as diocesan transition officer, transition search consultant and/or human resources specialist
- Prior experience/training as consultant
- Self-differentiated
- Collaborative leadership style
- Clear and concise communication skills
- Good listening and analytical skills and awareness of group dynamics
- Proficient in family systems
- Background/training in conflict management
- Ability to facilitate and guide group processes without interjecting personal preferences/agendas
- Ability to work with established procedures/practices with an openness and flexibility to adapt them to local custom/practice
- Demonstrated diversity training/awareness

## **Core Competencies for Clergy and Pastoral Ministers Addressing Alcohol and Drug Dependence and Other Addictive Behaviors**

### **Knowledge**

A comprehensive and broad understanding of alcohol and drug dependence and other addictive behaviors and the effects of these on the individual, their family, friends, coworkers, and community. This includes signs of dependence, possible indicators of the disease, intervention, characteristics of withdrawal, stages of recovery, knowledge of support groups and other resources available to the addicted person and family system, competency in understanding and recognizing co-dependence.

Be aware of the generally accepted definition of substance use disorder and other addictive behaviors.

Be knowledgeable about signs of substance use disorder and other addictive behaviors.

### **Pastoral Knowledge and Skills**

Ability to acknowledge and address your own values, issues, and attitudes regarding addictive behavior and dependence.

Awareness of the need for appropriate pastoral understanding and interactions with the addicted person, family system and children. Knowledge of what interactions are appropriate.

Ability to communicate and sustain messages of hope and caring with an appropriate level of concern.

An understanding that addiction erodes and blocks religious and spiritual development; and be able to effectively communicate the importance of spirituality and the practice of religion in recovery, using the scripture, traditions, and rituals of faith community.

Ability to shape, form, and educate a team that welcomes and supports persons affected by dependencies, and educate the community of how prevention strategies can benefit the larger community.

Adapted from: *Preventing and Addressing Alcohol and Drug Problems: A Handbook for Clergy*, National Association for Children of Addiction, 2019

## Information Gathering Process About Applicants in Episcopal Search Processes

- Obtain information from the applicant.
  - Property drafted release and indemnification forms from the applicant must be obtained
- Application including education history, employment history, military history, etc.
  - Some sort of behavioral history questionnaire
  - Medical history
  - Misconduct history including Title IV
  - Mental health, behavioral health, substance abuse history
  - Criminal, credit, name changes, motor vehicle, legal proceedings history including domestic and bankruptcy
  - Social media presence
- Extensive interviews with applicant
- “Ten Tough Questions” (it is actually many more than that) typically asked by the Chancellor or some other person at a discernment retreat
- Other?
- Verify information obtained from the applicant.
  - Obtain education records for anything other than bachelor’s degree and initial “seminary” or other theological education used to obtain ordination to the diaconate and priesthood.
  - Verify employment in The Episcopal Church with Recorder of Ordinations
  - Verify any other post-ordination employment outside The Episcopal Church
- Obtain information from Experts and Others
  - Medical evaluation
  - Psychological evaluation
  - Behavioral evaluation
  - Substance abuse evaluation
  - Reference checks- both of all those supplied by the applicant and blind references not supplied by the applicant
- Evaluate the Information.
  - Consultation on meaning of criminal, legal proceedings, credit and other public records
- Make Decisions about the applicant in light of gathered Information

## **The Screening Process - The Discernment Retreat and Beyond**

All those invited to the discernment retreat (semi-finalists) fill out the Life History Questionnaire (LHQ) and Behavioral Screening Questionnaire (BSQ) and submit it directly to Office of Pastoral Development prior to attending the retreat.

All invited to the retreat also complete their medical examination, using the required forms and submit directly to the President of the Standing Committee and the Office of Pastoral Development.

Invitees to the discernment retreat are advised to be prepared to clear their calendars for specific dates in the week or two after the search committee will meet in the event they are selected for the slate and need undergo a psychological exam.

Those not invited to the slate are contacted immediately after the search committee meets and thanked for their participation. We recommend that there is a consistent practice developed around giving feedback to applicants who are not invited to the slate.

Those who will be invited to be nominated are so notified immediately after the search committee and Standing Committee make their decision. Those intended to be nominated contact the psychological examiner for one of the open slots being held for this purpose. The psychological examination happens BEFORE the slate of nominees is announced. Results of the psychological examination (certificate) are e-mailed or telephoned immediately upon completion and simultaneously to the President of the Standing Committee of the electing diocese and the Office of Pastoral Development.

If there is absolutely no information of concern, the President of Standing Committee, after consultation with the Office of Pastoral Development, advises Chair of search committee of the prospective nominee's successful completion of the psychological, behavioral, and substance evaluations. In this case no details regarding any of the evaluations are provided. Only then does the Standing Committee announce the slate of nominees. Ideally, the time from the discernment retreat to announcing the slate of nominees would be about 2-3 weeks. Applicants are advised of this timing.

If the psychological or background screening are negative, applicants can withdraw from the process before they are announced publicly as a nominee.

If there are indications from the psychological or other evaluations or background screening that need further follow-up, that is done as soon as possible, acknowledging that completing it could delay the announcement of a slate of nominees.

This process results in no applicants being included in the slate of nominees before the medical examination, psychological and other evaluations, and other background screening have been completed, avoiding the public relations challenges for the electing diocese and for the applicant(s)

if a nominee has to be removed from the slate of nominees due to the results of the various evaluations and screens.

## Psychological Evaluation

The purpose of the psychological evaluation in episcopal election processes is to assure the mental and emotional fitness for episcopal leadership. The psychological evaluation is one piece of a "bundle" of screenings and evaluations of an applicant. The psychological evaluation seeks to evaluate vulnerability/fragility susceptible to stress of episcopal ministry and to identify mental resilience and capacity. In particular, the psychological evaluation needs to expose the following "red light" disorders which would likely disqualify an applicant for the episcopate:

- Personality/Character disorders
- Dual diagnoses
- Conduct disorders

In addition, the psychological evaluation needs to expose the following disorders which may not disqualify an applicant but would require focused evaluation to provide information for a search committee's discernment.

- Depressive and anxiety disorders
- Addiction(s)

The work group consulted with a number of clinicians, from whom three consensual points emerged:

1. Psychological evaluations are often invested with too much weight. They are but one element in a comprehensive process of overall screening.
2. Psychological evaluations are fallible in and of themselves. People can "fudge" them.
3. There is value in having a preliminary piece of the psychological evaluation done by a Social Worker trained in the taking of psychosocial histories, with a summary provided to the examining psychologist.

The work group had the following comments/concerns/questions about this process, which will need to be addressed in more detail in the future.

- Ideally regional examining psychological resources would be developed, all using same protocols, for convenience to various locations and for the sake of diversity, for example east coast, mid-US, west coast.
- This process requires tight turn-around time for psychological evaluation, especially for petition nominees.
- This process requires tight turn-around time when psychological evaluation indicates need for further evaluation.
- The segmentation of the discernment process suggests the need for a single point person for the electing diocese and for the wider Church. The President of the Standing Committee of the electing diocese and the Office of Pastoral Development are the logical places for this role.

## Psychological Screen Examination Details

Prior to the psychological evaluation appointment:

- Obtain a Release from the applicant for the evaluator to contact providers of prior treatment especially hospitalizations, dual diagnoses, suicidality.
- Explanation of Release coming by email, to be signed and brought to appointment,
- Evaluator reviews Life History Questionnaire and Behavioral Screening Questionnaire obtained from the President of the Standing Committee or the Office of Pastoral Development.
- Evaluator reads all applicant materials submitted to the search committee. This is not the current practice.
- A Social Worker conducts a social history interview, forwards summary to the evaluator. This interview includes:

Discussion of items from the Behavioral Screening Questionnaire

Preliminary exploration of prior psychological/substance abuse history. The psychological evaluation process takes 2 days.

### Day One:

- Completion of testing (Day 1 morning);
- Testing scored electronically - stat results to examining psychologist
- Lunch and free hour
- Meeting with substance abuse specialist for screening (2.5 hours) about use of alcohol/drugs/other addictions. Family history w/alcohol/drugs is explored. Summary provided to examining psychologist

**Day Two:**

- Neurocognitive (NC) screening [memory, reasoning power, logic]
- Review of results of NC screening - report to file
- Clinical interview #1 - Psychologist (60 minutes)
- Review of items from Life History Questionnaire and Behavioral Screening Questionnaire
- Depression screening
- Mood stability
- Self-awareness exploration
- Stress management
- Review of Rx history, relevant medical history
- Lunch and break
- Clinical Interview #2 - Psychologist (90 minutes)
- Projective testing (TAT? Mixed opinions on usefulness of these)
- Sexual history and present sexual adjustment
- Personality Structure
- Deeper focus on family of origin
- Summary and Recommendations from psychological evaluation to applicant

## Handling of Information Yielded by Psychological Evaluation and Other Screening

Clarity and consistency around this step in the discernment process is vital. Data tell us this is one of the areas of confusion, which has resulted in unsuitable people being on the slate.

General principles:

- [Do nominees sign a Release at the beginning of the process, accepting that their personal info, as it emerges during this process, will be shared w appropriate parties on need-to-know basis? Privacy vs Confidentiality]
- The sitting bishop does not have access to psychological evaluation results and does not participate in the search committee's discernment work.
- All costs/expenses for psychological evaluation, further evaluations (if applicable) are the responsibility of the electing diocese.
- Names on the slate of nominees are not announced unless/until all screenings and evaluations are completed and in good order.
- Decisions about not continuing an applicant to be on the slate of nominees because of findings from psychological evaluation are made through consultation amongst at least two parties. Decisions are not made by one person acting alone.
- If the psychological evaluation reveals areas of concern, we (the Church) owe it to the applicant to advise them accordingly.

Fundamentally, we can envision three broad outcomes from psychological evaluation

All Clear (green light)

- Applicant continues to the slate of nominees, per their personal discernment
- Communicating this: Chair of search committee
- Clinical file held in by the President of the Standing Committee and the Office of the Presiding Bishop, generally in the Office of Pastoral Development

Area(s) of Concern (yellow light)

- Applicant referred to appropriate provider to undertake further evaluation
- Applicant must pursue further evaluation if discerning continues
- Communicating this: President of the Standing Committee or the Bishop for the Office of Pastoral Development
- Clinical file stays open pending results of further evaluation
- File ultimately held in the permanent records of the electing diocese and in the Archives of The Episcopal Church

Continuation in discernment is contraindicated (red light)

- Applicant given information on psychological evaluation findings
- Communicating this: President of the Standing Committee or the Bishop for the Office of Pastoral Development, ideally by phone
- Note: per the proposed process, no opportunity is provided for appeal or second opinion
- If the person is elected the bishop, one copy of the file is placed in the permanent records of the diocese and another copy is placed in the Archives of The Episcopal Church

Various parties may be involved in evaluating and acting upon results of the psychological evaluation:

- President, Standing Committee of Electing Diocese
- Chair diocesan search
- Office of the Presiding Bishop
- Office of Pastoral Development
- Applicant Nominee and Family
- Entire search committee
- Entire Standing Committee
- Chancellor of electing diocese

Specific flow of Information from the proposed process

- Applicant signs Authorization and Release
- The applicant completes the Life History Questionnaire (LHQ) and Behavioral Screening Questionnaire (BSQ) (digitally? encrypted?)
- LHQ and BSQ are transmitted to examining psychologist
- Completed medical exam form to examining psychologist
- Background check reports simultaneously to the President of the Standing Committee and the Office of Pastoral Development
- Social Worker conducts (Zoom, Skype, etc.) a 60-min social history interview
- Social Worker transmits summary of the social history to examining psychologist
- Personal meeting between applicant and examining psychologist
- Examining psychologist submits canonical certificate and evaluation simultaneously to President of the Standing Committee and the Office of Pastoral Development
- President of the Standing Committee or Office of Pastoral Development notifies Chair of search committee of successful psychological evaluation results

Retention and Destruction of Background Screening and Various Evaluations

- For all applicants who are not elected and ordained bishop as a result of the particular episcopal election process, all copies of all background screening and various evaluations are collected by the Standing Committee President and destroyed
- For the applicant elected and ordained bishop as a result of the particular episcopal election process, one copy of all background screening information and all information regarding the various examinations and evaluations is placed in the permanent records of the electing diocese
- For the applicant elected and ordained bishop as a result of the particular episcopal election process, one copy of all background screening information and all information regarding the various examinations and evaluations is sent to and maintained by the Archives of The Episcopal Church
- For the applicant elected and ordained bishop as a result of the particular episcopal election process, all copies of all background screening and various evaluations other than the two copies described above, are collected by the Standing Committee President and destroyed